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Automotive Classified:

A Study of Prospect Status, Readership & Interest.

Newspaper Advertising Bureau, Inc.
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Automotive Classified:

A Study of Prospect Status, Readership & Interest.

AUTOMOTIVE CLASSIFIED:

A STUDY OF PROSPECT STATUS, READERSHIP AND INTEREST

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

November 1986

Newspaper Advertising Bureau, Inc.

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HIGHLIGHTS

- Many Americans have a continuing love affair with automobiles. In response to a question about their general interest in cars, 33% of the respondents in this national survey say that they "try to keep up" with the automotive market. Interest runs especially high among men (at 47%); adults under 25 years old (53%); those with college backgrounds; and people with household incomes of $15,000 and over. (Table 1)

- Among those who like to keep up with cars, the main information source is classified advertising in the daily and Sunday newspaper. 59% of those who want general information about cars, car prices or financing mention classified advertising, dealer advertising or some other part of their daily or Sunday newspaper. No other information source receives even one third as many mentions. (Table 2)

- A car is also a necessity for most Americans: 77% of the respondents in this survey report owning one or more. Before they are 25 years old, more than six out of ten young adults (64%) have already acquired cars, and the level of ownership reaches a high of 86% between the ages of 25 and 54. (Table 3)

- In spite of the automobile's importance and appeal, only a small proportion of adults (5%) are actively in the market for a car at any given point in time. Another 22% admit that they might be tempted by "a good buy" even though they are not "looking" at the moment. Active interest in a car is highest (at 11%) among those under 25 years old. (Table 4)

- On an average weekday or Sunday, 18% to 19% of all newspaper readers look at one or more categories of automotive classified advertising. Readership is highest for the familiar "New Cars" (12%) and "Used Cars" (13%) classifications, but more specialized headings like "Trucks" (6%), "Sports Cars" (5%), and "Recreational Vehicles" (5%) also attract readers. For almost all classifications, readership is highest among men and those under 25 years old. (Table 5)

- Browsing in the automotive classified can trigger buying interest even among secondary prospects and those who "aren't interested" in buying right now. In fact, people who don't describe themselves as actively looking for a car nevertheless read automotive classified and can become interested in the advertising and decide to follow it up. (Table 6)

HIGHLIGHTS (continued)

- The combination of an ongoing interest in cars and rapidly shifting prospect status makes automotive classified a massive marketplace. The results of this research indicate that in a single week an estimated 28 million Americans read the automotive classified pages. About nine million become interested in one or more of the ads they see, and about three million decide to follow up one or more ads. (Table 6)

- Apart from their feelings toward cars, about seven out of ten adults express highly positive feelings toward classified advertising in the daily and Sunday newspaper. When asked to rate classified advertising on a five-point scale, 66% give classified advertising favorable marks for being helpful; 67%, for making it easy to find what you want; and 70%, for being a good place to advertise. (Table 7)

Table 1

General Interest in Information on Cars
(by demographics)

	Unweighted Base: = 100%	Percent Who "Try to Keep Up"
Total adults	1,174	33%
By sex:		
Men	504	47%
Women	670	22
By age:		
18-24 years	141	53%
25-34 years	283	40
35-44 years	215	36
45-54 years	154	34
55-64 years	157	24
65 years or older	215	15
By education:		
College graduate	199	38%
1-3 years college	241	44
High school graduate	420	33
Some high school or less	298	26
By household income:		
$35,000 and over	219	35%
$25,000 - $34,999	159	45
$15,000 - $24,999	233	39
Under $15,000	401	28
By newspaper edition:		
Weekday edition	439	34%
Sunday edition	174	34

Question: Apart from any immediate interest you have in buying a car, do you generally try to keep up with what's available--new models or features, list prices or finance terms, etc?

Table 2

Main Source of Information on Cars

	Percent Mentioning[a]
Classified ads, daily or Sunday newspaper[b]	59%
Television, TV	18
Friends, relatives, coworkers	17
Car dealers, lots	12
Magazines	11
Weekly newspaper, classified	5
Radio	2
All other mentions	11
Base: Those who like to "keep up" with cars = 100%	(382)

Question: What is your main source of information about cars, prices and financing? (IF NEWSPAPER MENTIONED) What parts of the newspaper give you the most information about cars, car prices and financing?

a) Total exceeds 100% because of multiple mentions.

b) Responses to the initial question and the probe indicate that the specific source of information was classified advertising for 44%; dealer ads (which are also classified advertising) for 9%, and some other part of the daily or Sunday newspaper for 6%.

Table 3

Current Automobile Ownership
(by demographics)

	Own Car	Do Not Own
Total adults	77%*	23%
By sex:		
Men	84%	16%
Women	71	29
By age:		
18-24 years	64%	36%
25-34 years	86	14
35-44 years	86	14
45-54 years	86	14
55-64 years	78	22
65 years or older	61	39
By education:		
College graduate	92%	8%
1-3 years college	85	15
High school graduate	77	23
Some high school or less	62	38
By household income:		
$35,000 and over	90%	10%
$25,000 - $34,999	94	6
$15,000 - $24,999	85	15
Under $15,000	61	39

Base: Total respondents = 100%

(See Appendix Base Table 1 for unweighted bases.)

* According to the 1985 Study of Media & Markets by Simmons Market Research Bureau, 78.6% of all adults report that they, or someone else in their household, currently own one or more cars.

Table 4

Automotive Prospect Status
(by demographics)

	Active Prospect	Secondary Prospect	All Other
Total adults	5%	22%	73%
By sex:			
Men	7%	26%	67%
Women	4	18	78
By age:			
18-24 years	11%	39%	50%
25-34 years	8	27	65
35-44 years	6	27	67
45-54 years	5	15	80
55-64 years	1	19	80
65 years or older	-	6	94
By education:			
College graduate	6%	27%	67%
1-3 years college	8	28	64
High school graduate	5	20	75
Some high school or less	3	17	80
By household income:			
$35,000 and over	5%	25%	70%
$25,000 - $34,999	7	23	70
$15,000 - $24,999	5	28	67
Under $15,000	5	19	76

Base: Total respondents = 100%

(See Appendix Base Table 1 for bases.)

Question: Which statement on this card best describes your own interest in buying a car right now?

I am actively looking for a car (another car).
I am not looking but would consider a car if a good buy came along.
I have absolutely no interest in a car.

Table 5

Readership of Automotive Classified Advertising Among Readers of Yesterday's Newspaper

	Net (Any Automotive)	New Cars	Used Cars
Total adult readers	18%	12%	13%
By sex:			
Men	26%	16%	18%
Women	11	7	8
By age:			
18-24 years	32%	22%	25%
25-34 years	18	12	14
35-44 years	15	8	11
45-54 years	18	11	15
55-64 years	22	11	9
65 years or older	12	9	9
By education:			
College graduate	18%	15%	10%
1-3 years college	23	17	17
High school graduate	18	9	12
Some high school or less	16	9	13
By household income:			
$35,000 and over	17%	12%	11%
$25,000 - $34,999	24	16	16
$15,000 - $24,999	22	10	14
Under $15,000	17	8	14
By newspaper edition read yesterday:			
Weekday edition	18%	12%	13%
Sunday edition	19	11	12

Base: Qualified yesterday readers with classification in newspaper read = 100%

(See Appendix Base Table 2 for unweighted bases.)

Table 5 (continued)

Readership of Automotive Classified Advertising Among Readers of Yesterday's Newspaper

	Trucks	Sports Cars	Recreational Vehicles
Total adult readers	6%	5%	5%
By sex:			
Men	10%	7%	7%
Women	3	3	3
By age:			
18-24 years	10%	15%	8%
25-34 years	4	3	2
35-44 years	7	7	5
45-54 years	11	7	8
55-64 years	6	-	5
65 years or older	3	2	4
By education:			
College graduate	7%	9%	5%
1-3 years college	8	7	6
High school graduate	6	4	5
Some high school or less	6	1	5
By Household income:			
$35,000 and over	4%	5%	3%
$25,000 - $34,999	10	8	8
$15,000 - $24,999	6	4	7
Under $15,000	7	3	3
By newspaper edition read yesterday;			
Weekday edition	6%	5%	5%
Sunday edition	9	6	7

Base: Qualified readers with classification in newspaper read = 100%

(See Appendix Base Table 2 for unweighted bases.)

Table 6

Readership, Interest and Follow-up of Automotive Classified
(Total U.S. adults, by prospect status)

	Total Adults (000s)	Active Prospects (000s)	Secondary Prospects (000s)	All Others (000s)
Projected totals	171,205*	9,210	37,375	124,620
Readership:[a]				
Yesterday	19,070	2,460	7,125	9,485
Past week	8,680	1,530	3,830	3,320
Total for 7-day week	27,750	3,990	10,955	12,805
Interest:				
Yesterday	5,840	990	2,645	2,205
Past week	3,080	590	1,455	1,035
Total for 7-day week	8,920	1,580	4,100	3,240
Follow-up:				
Yesterday	1,880	460	725	695
Past week	1,200	325	420	455
Total for 7-day week	3,080	785	1,145	1,150

* Source for estimate of total adult population:
Simmons Market Research Bureau, 1986 Study of Media & Markets

Questions: Did you read or look at any of the ads for _____ (new cars, used cars, etc.)? Did you see any ads for (TYPE) that you might be interested in? Did you follow up on any of the ads you saw for (TYPE)? (If "NO") Do you intend to follow up on any of the ads you saw for (TYPE)?

a) Note that "yesterday" denotes only qualified yesterday readers. Some of these may also have read on other days during the past week, but they were not questioned about classified advertising readership on other days. In this table "past week" denotes "did not read (a newspaper in the interviewer's kit) yesterday, but read in the past week".

Table 7

General Attitudes Toward Classified Advertising
(by demographics)

	Percent with Positive Attitudes on:		
	Helpful	Easy to Find What You Want	A Good Place to Advertise
Total adults	66%	67%	70%
By sex:			
Men	63%	68%	69%
Women	69	67	71
By age:			
18-24 years	62%	69%	74%
25-34 years	67	62	72
35-44 years	66	74	71
45-54 years	73	75	72
55-64 years	68	66	68
65 years or older	64	64	67
By education:			
College graduate	60%	67%	67%
1-3 years college	73	72	73
High school graduate	66	67	70
Some high school or less	68	67	73
By household income:			
$35,000 and over	68%	75%	70%
$25,000 - $34,999	74	76	74
$15,000 - $24,999	62	61	70
Under $15,000	64	66	70
By newspaper edition read yesterday:			
Weekday edition	70%	74%	74%
Sunday edition	73	77	73

Question: Using this scale from one to five, with five meaning "extremely good" and one meaning "extremely poor", how would you rate classified advertising in the newspaper on: making it easy to find what you want? being helpful? being a good place to advertise things you want to sell?

(Figures shown represent combined "4" and "5" ratings.)

APPENDIX

DESCRIPTION OF RESEARCH

This report, one of three on consumer usage of classified advertising in daily and Sunday newspapers, is based on the results of a national, in-home survey of 1,174 adults conducted by Response Analysis of Princeton in the spring of 1986.

Purpose

For each of the three major categories of classified advertising (automotive, employment and real estate) the research had similar goals: to estimate the size of the classified audience on a typical weekday or Sunday and over a seven-day week; to determine the percentage of adults who are likely to be active or secondary prospects at any given time; to relate prospect status to readership of the relevant classified category and intentions to follow up on the advertising; to check the extent of continuing interest in cars, jobs and housing among the adult population; and to investigate general attitudes toward the classified medium.

Method and Sample

The research utilizes personal, in-home interviewing in one hundred primary sampling units (PSUs) across the United States (excluding Alaska and Hawaii). Response Analysis supervised sampling and stipulated the

procedures for selecting households and respondents. (Only one adult was interviewed in each household chosen.) Up to four calls, or three callbacks, were made in order to complete interviews with designated respondents.

In the screening phase of the interview, respondents were asked about their current level of interest in buying a car, finding employment, and buying or renting a house or apartment. Screening also included questions about daily and Sunday newspaper readership over the past seven days.

Respondents who reported reading yesterday's edition[1] of a daily or Sunday newspaper were shown specific classified headings in that edition and asked about their reading, interest and follow-up of ads under each heading.[2] Those who had not read yesterday's newspaper were shown a card listing the most common automotive, employment and real estate classifications and asked which of these they recalled reading the last time they had read a newspaper. The analysis of classified readership was limited to respondents reading a newspaper within the last seven days.

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1) Interviewing was conducted Monday through Saturday. In order to collect information on Sunday section and insert readership, about twice as many respondents were interviewed on Monday as on any other single day.

2) Yesterday's newspaper pages carried in the interviewer's kit included all newspapers with a circulation-to-household ratio of 10% or more in that locality. Respondents who had read one of the newspapers in the interviewer's kit were designated as "qualified" yesterday readers. Respondents who had read a yesterday edition not included in the interviewer's kit were treated as "past week" readers.

Field Experience

Interviews were completed with 1,174 respondents, resulting in a response rate of 65%, as follows:

Total Housing Units Assigned	1,932
Vacant, nonexistent	-135
Eligible units (= 100%)	1,797
Completed interviews	1,174
Not interviewed:	
Refusals	242
Other (Not at home, illness, etc.)	381
Total not interviewed	623

Verification

A systematic sample of approximately 15% of interviews was verified through brief telephone interviews. Verification was undertaken to determine whether the interview was actually completed with the designated respondent and to assure that it covered the appropriate subject matter. The verifications revealed no evidence of questionable work on the part of the interviewers.

Weighting

A two-stage weighting procedure was used. In the first stage each respondent was given a weight inversely proportional to his or her probability of household selection and inversely proportional to the response rate in the stratum to which his/her location was assigned. (For this survey a stratum was defined by Census region with these first-stage strata: 25 most populous MSAs, other MSAs, and non-MSA counties.)

In the second stage of balancing, sample proportions were weighted to bring them into line with 1984 Current Population Reports projections for race, Hispanic origin, age, sex, and education.

Sponsorship

Newspaper Advertising Bureau, Inc., developed the questionnaires, specified the research design, commissioned the field work and analyzed the data. This report was written by Charles Lehman of NAB's Research Department. Copies of the questionnaires and additional details on sampling and interviewing procedures are available on request.

Appendix Base Table 1

Unweighted Bases for Total Respondents, Yesterday Readers and Past Week Readers, by Demographics

	Total Respondents	Yesterday Readers*	Past Week Readers*
Total adults	1,174	613	281
By sex:			
Men	504	282	119
Women	670	331	162
By age:			
18-24 years	141	59	42
25-34 years	283	131	89
35-44 years	215	117	58
45-54 years	154	90	29
55-64 years	157	90	31
65 years or older	215	123	28
By education:			
College graduate	199	123	59
1-3 years college	241	138	70
High school graduate	420	228	92
Some high school or less	298	121	54
By household income:			
$35,000 and over	219	152	51
$25,000 - $34,999	159	99	39
$15,000 - $24,999	233	125	63
Under $15,000	401	159	89

*Bases shown for yesterday readers refer only to "qualified" readers who had read a newspaper included in the interviewer's kit. Other yesterday readers were treated as past week readers.

Appendix Base Table 2

Qualified Yesterday Readers with Automotive Classification in Newspaper

	Net (Any Automotive)	New Cars	Used Cars
Total adult readers	598	577	582
By sex:			
Men	274	264	267
Women	324	313	315
By age:			
18-24 years	57	56	55
25-34 years	126	122	123
35-44 years	116	111	115
45-54 years	86	81	83
55-64 years	88	85	86
65 years or older	122	119	117
By education:			
College graduate	115	111	114
1-3 years college	134	131	132
High school graduate	226	217	217
Some high school or less	121	116	117
By household income:			
$35,000 and over	143	139	141
$25,000 - $34,999	97	93	95
$15,000 - $24,999	123	120	122
Under $15,000	157	152	148
By newspaper edition read yesterday:			
Weekday edition	424	404	408
Sunday edition	174	173	174

(All bases shown are unweighted.)

Appendix Base Table 2 (continued)

Qualified Yesterday Readers with Automotive Classification in Newspaper

	Trucks	Sports Cars	Recreational Vehicles
Total adult readers	590	505	585
By sex:			
Men	269	241	270
Women	321	264	315
By age:			
18-24 years	55	46	55
25-34 years	125	108	123
35-44 years	115	95	114
45-54 years	85	73	84
55-64 years	87	73	85
65 years or older	120	108	121
By education:			
College graduate	114	100	112
1-3 years college	134	105	133
High school graduate	222	189	220
Some high school or less	118	109	118
By household income:			
$35,000 and over	142	116	141
$25,000 - $34,999	96	82	96
$15,000 - $24,999	121	103	120
Under $15,000	153	138	152
By newspaper edition read yesterday:			
Weekday edition	416	352	413
Sunday edition	174	153	172

(All bases shown are unweighted.)

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Employment Classified:

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Employment Classified:

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EMPLOYMENT CLASSIFIED:

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APPENDIX:

DESCRIPTION OF RESEARCH................................ i

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HIGHLIGHTS

- The findings of this national survey indicate that 35% to 40% of all adults in the United States "try to keep up with" information about the job market. This kind of interest encourages browsing in the employment classified section of the newspaper and is highest among people with college backgrounds, those who are currently employed and adults under 35 years of age. (Table 1)

- For those who want to keep up with salaries, job openings and other information on the employment market, classified advertising in the daily and Sunday newspaper is the number-one source. In fact, classified ads in the newspaper receive more than twice as many mentions (59%) as all other commercial media combined. The second most important source of information (mentioned by 35%) is friends, relatives and coworkers. (Table 2)

- About six out of ten American adults (59%) are currently employed. The level of employment is highest (at 75% to 80%) among people with college backgrounds. Employed adults represent only a third of those actively investigating the job market, but they account for three fourths (74%) of the secondary prospects who would take (or change) jobs "if the right one came along". (Table 3)

- In spite of the high level of continuing interest in job market information, only a small proportion of adults (7% at the time of this survey) is actively seeking employment at any given point in time. Secondary prospects account for an estimated 22% of all adults; this key group, mostly employed, contains many of the skilled and specialized workers sought by recruitment advertisers. Among adults under 25 years old, 17% are active prospects for jobs. (Table 4)

- On average, 18% of the daily newspaper audience and 24% of the Sunday audience read one or more categories of employment classified ads. Traditional job listings attract the highest level of readership (18%), but recruitment advertising (at 13%) and employment agency ads (at 8%) also draw readers. Readership is highest among readers who are under 30 years old and drops off sharply at age 65. (Table 5)

- At the national level, employment classified represents a massive resource for both employers and job seekers. Over a seven-day week, an estimated 29 million adults read employment classified ads; about 10 million become interested in one or more ads; and over 3 1/2 million decide to follow up one or more. (Table 6)

- Browsing in the employment classified can trigger interest and follow-up even among seconday prospects and those who have "absolutely no interest" in a job. In fact, this research shows that adults who don't define themselves as active job prospects nevertheless read employment classified ads and can become interested in the advertising and decide to follow it up. (Table 6)

- Apart from any specific personal interest in the job market, about seven out of ten adults express positive feelings toward classified advertising in the daily and Sunday newspaper. When asked to rate the medium on a five-point scale, 66% give classified advertising favorable marks for being helpful; 67%, for making it easy to find what you want; and 70% for being a good place to advertise. (Table 7).

- The somewhat lower positive rating (52%) for "being a good way to find a job" reflects the unique nature of employment and the fact that many adults have had little experience in the job market. For instance, some adults may find it difficult to rate classified advertising on this item because they have spent years or even their entire working career with a single employer. (Table 7)

Table 1

General Interest in Information About Job Market
(by demographics)

	Unweighted Base: = 100%	Percent Who "Try to Keep Up"
Total adults	1,174	37%
By sex:		
Men	504	40%
Women	670	35
By age:		
18-24 years	141	44%
25-29 years	137	58
30-34 years	146	50
35-44 years	215	37
45-54 years	154	47
55-64 years	157	23
65 years or older	215	17
By education:		
College graduate	199	46%
1-3 years college	241	43
High school graduate	420	37
Some high school or less	298	29
By occupation:		
Professional, manager	206	44%
Technical, clerical, sales	196	45
Other employed	246	50
Not employed	494	26
By newspaper edition:		
Weekday edition	439	38%
Sunday edition	174	33

Question: Apart from any immediate interest you might have in changing jobs or finding employment, do you generally try to keep up with what's going on in the job market, the salaries being offered for your kind of work, and so forth?

Table 2

Main Source of Information About Job Market

	Percent Mentioning[a]
Classified ads, daily or Sunday newspaper[b]	59%
Friends, relatives, coworkers	35
Magazines	10
Television, TV	9
Union, trade association, etc	6
Weekly newspaper, classifieds	4
Radio	3
All other mentions	13
Base: Those who like to "keep up" with job market = 100%	(435)

Question: What is your main source of information about what's going on in the job market? (IF NEWSPAPER MENTIONED) What part of the newspaper gives you the most information about what's going on in the job market?

a) Total exceeds 100% because of multiple mentions.

b) Responses to the initial question and the probe indicate that the specific source of information was classified advertising for 49%; the business pages, for 7%; and some other part of the daily or Sunday newspaper for 3%.

Table 3

Current Employment Status
(by demographics)

	Total Employed	Professional, Manager	Technical, Clerical, Sales
Total adults[a]	59%	19%	17%
By sex:			
Men	75%	24%	13%
Women	45	13	20
By age:			
18-24 years	65%	12%	29%
25-29 years	80	23	21
30-34 years	77	31	18
35-44 years	77	31	20
45-54 years	77	20	19
55-64 years	47	17	11
65 years or older	11	2	4
By education:			
College graduate	79%	53%	16%
1-3 years college	77	23	31
High school graduate	60	10	20
Some high school or less	33	3	5
By household income:			
$35,000 and over	79%	35%	17%
$25,000 - $34,999	81	28	23
$15,000 - $24,999	64	16	22
Under $15,000	32	3	10
By employment prospect status:			
Active prospect	33%	14%	8%
Secondary prospect	74	21	25
All other	57	18	15

a) Some rows do not total 100% because "no answers" have been omitted (2% of total responses). Occupational groups may not add to total employed for same reason.

Table 3 (continued)

Current Employment Status
(by demographics)

	Other Employed	Not Employed
Total adults[a]	22%	40%
By sex:		
Men	33%	25%
Women	11	54
By age:		
18-24 years	22%	34%
25-29 years	35	18
30-34 years	25	23
35-44 years	23	23
45-54 years	37	22
55-64 years	15	52
65 years or older	4	89
By education:		
College graduate	6%	21%
1-3 years college	22	23
High school graduate	28	39
Some high school or less	24	66
By household income:		
$35,000 and over	24%	21%
$25,000 - $34,999	29	18
$15,000 - $24,999	12	19
Under $15,000	18	67
By employment prospect status:		
Active prospect	11%	67%
Secondary prospect	26	24
All other	21	43

a) Some rows do not add to 100% because "no answers" have been omitted (2% of total responses). Occupational groups may not add to total employed for same reason.

Table 4

Employment Prospect Status
(by demographics)

	Active Prospect	Secondary Prospect	All Other
Total adults	7%	22%	71%
By sex:			
Men	5%	23%	72%
Women	8	21	71
By age:			
18-24 years	17%	42%	41%
25-29 years	11	37	52
30-34 years	10	24	66
35-44 years	3	25	72
45-54 years	6	19	76
55-64 years	2	11	87
65 years or older	-	3	97
By education:			
College graduate	7%	22%	71%
1-3 years college	3	26	71
High school graduate	9	24	67
Some high school or less	5	15	80
By occupation:			
Professional, manager	5%	24%	71%
Technical, clerical, sales	3	33	64
Other employed	3	26	71
Not employed	11	13	76

Base: Total respondents = 100%

(See Appendix Base Table 1 for bases.)

Question: Which statement best describes your own personal interest right now in finding a job?

I am actively looking for a (new) job.
I am not actively looking but would change jobs (take a job) if the right one came along.
I have absolutely not interest in changing jobs (taking a job).

Table 5

Readership of Employment Classified Advertising Among Readers of Yesterday's Newspaper

	Net (Any Employment)	Career Opportunities[a]
Total adult readers	19%	13%
By sex:		
Men	17%	13%
Women	21	13
By age:		
18-24 years	34%	22%
25-29 years	40	17
30-34 years	21	13
35-44 years	12	10
45-54 years	24	14
55-64 years	16	16
65 years or older	7	6
By education:		
College graduate	22%	17%
1-3 years college	19	9
High school graduate	21	14
Some high school or less	15	11
By occupation:		
Professional, manager	17%	11%
Technical, clerical, sales	19	13
Other employed	26	18
Not employed	18	11
By newspaper edition read yesterday:		
Weekday edition	18%	12%
Sunday edition	24	17

Base: Qualified yesterday readers with classification in newspaper read = 100%

(See Appendix Base Table 2 for unweighted bases.)

a) Label designates recruitment ads in display format.

Table 5 (continued)

Readership of Employment Classified Advertising Among Readers of Yesterday"s Newspaper

	Employment Agencies	Job Listings
Total adults	8%	18%
By sex:		
Men	7%	16%
Women	8	19
By age:		
18-24 years	10%	31%
25-29 years	11	38
30-34 years	10	17
35-44 years	5	11
45-54 years	13	23
55-64 years	8	15
65 years or older	4	6
By education:		
College graduate	6%	21%
1-3 years college	3	16
High school graduate	11	20
Some high school or less	7	13
By occupation:		
Professional, manager	5%	15%
Technical, clerical, sales	8	18
Other employed	14	24
Not employed	6	16
By newspaper edition read yesterday:		
Weekday edition	8%	17%
Sunday edition	9	21

Base: Qualified readers with classification in newspaper = 100%

(See Appendix Base Table 2 for unweighted bases.)

Table 6

Readership, Interest and Follow-up of Employment Classified
(Total U.S. adults, by prospect status)

	Total Adults (000s)	Active Prospects (000s)	Secondary Prospects (000s)	All Others (000s)
Projected totals	171,205*	11,300	36,800	123,105
Readership:				
Yesterday[a]	19,900	5,325	6,365	8,210
Past week[a]	8,800	1,375	4,275	3,150
Total for 7-day week	28,700	6,700	10,640	11,360
Interest:				
Yesterday	7,030	2,915	2,390	1,725
Past week	2,900	845	1,575	480
Total for 7-day week	9,930	3,760	3,965	2,205
Follow-up:				
Yesterday	2,535	1,515	750	270
Past week	1,095	555	325	215
Total for 7-day week	3,630	2,070	1,075	485

* Source for estimate of total adult population:
Simmons Market Research Bureau, 1986 Study of Media & Markets

Questions: Did you read or look at any of the ads for ______(career opportunities, etc.)? Did you see any ads for (TYPE) that you might be interested in? Did you follow up on any of the ads you saw for (TYPE)? (IF "NO") Do you intend to follow up on any of the ads you saw for (TYPE)?

a) Note that "yesterday" denotes only qualified yesterday readers. Some of these may also have read on other days during the past week, but they were not questioned about classified advertising readership on other days. In this table "past week" denotes "did not read (a newspaper in the interviewer's kit) yesterday, but read in the past week".

Table 7

General Attitudes Toward Classified Advertising
(by demographics)

	Percent with Positive Attitudes on:	
	Helpful	Easy to Find What You Want
Total adults	66%	67%
By sex:		
Men	63%	68%
Women	69	67
By age:		
18-24 years	62%	69%
25-29 years	62	56
30-34 years	71	67
35-44 years	66	74
45-54 years	73	75
55-64 years	68	66
65 years or older	64	64
By education:		
College graduate	60%	67%
1-3 years college	73	72
High school graduate	66	67
Some high school or less	68	67
By occupation:		
Professional, manager	61%	71%
Technical, clerical, sales	66	71
Other employed	69	68
Not employed	66	65
By newspaper edition read yesterday:		
Weekday edition	70%	74%
Sunday edition	73	77

Question: Using this scale from one to five, with five meaning "extremely good" and one meaning "extremely poor", how would you rate classified advertising in the newspaper on: making it easy to find what you want? being helpful? being a good place to advertise things you want to sell?

(Figures shown represent combined "4" and "5" ratings.)

Table 7 (continued)

General Attitudes Toward Classified Advertising
(by demographics)

	Percent with Positive Attitudes on:	
	A Good Place to Advertise	A Good Way to Look for a Job
Total adults	70%	52%
By sex:		
Men	69%	45%
Women	71	58
By age:		
18-24 years	74%	55%
25-29 years	72	51
30-34 years	72	59
35-44 years	71	48
45-54 years	72	55
55-64 years	68	53
65 years or older	67	48
By education:		
College graduate	67%	43%
1-3 years college	73	46
High school graduate	70	55
Some high school or less	73	58
By occupation:		
Professional, manager	69%	44%
Technical, clerical, sales	73	54
Other employed	75	56
Not employed	67	53
By newspaper edition read yesterday:		
Weekday edition	74%	56%
Sunday edition	73	52

Question: Using this scale from one to five, with five meaning "extremely good" and one meaning "extremely poor", how would you rate classified advertising in the newspaper on: being a good place to advertise things you want to sell? being a good way to look for a job?

(Figures shown represent combined "4" and "5" ratings.)

APPENDIX

DESCRIPTION OF RESEARCH

This report, one of three on consumer usage of classified advertising in daily and Sunday newspapers, is based on the results of a national, in-home survey of 1,174 adults conducted by Response Analysis of Princeton in the spring of 1986.

Purpose

For each of the three major categories of classified advertising (automotive, employment and real estate) the research had similar goals: to estimate the size of the classified audience on a typical weekday or Sunday and over a seven-day week; to determine the percentage of adults who are likely to be active or secondary prospects at any given time; to relate prospect status to readership of the relevant classified category and intentions to follow up on the advertising; to check the extent of continuing interest in cars, jobs and housing among the adult population; and to investigate general attitudes toward the classified medium.

Method and Sample

The research utilizes personal, in-home interviewing in one hundred primary sampling units (PSUs) across the United States (excluding Alaska and Hawaii). Response Analysis supervised sampling and stipulated the

procedures for selecting households and respondents. (Only one adult was interviewed in each household chosen.) Up to four calls, or three callbacks, were made in order to complete interviews with designated respondents.

In the screening phase of the interview, respondents were asked about their current level of interest in buying a car, finding employment, and buying or renting a house or apartment. Screening also included questions about daily and Sunday newspaper readership over the past seven days.

Respondents who reported reading yesterday's edition[1] of a daily or Sunday newspaper were shown specific classified headings in that edition and asked about their reading, interest and follow-up of ads under each heading.[2] Those who had not read yesterday's newspaper were shown a card listing the most common automotive, employment and real estate classifications and asked which of these they recalled reading the last time they had read a newspaper. The analysis of classified readership was limited to respondents reading a newspaper within the last seven days.

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1) Interviewing was conducted Monday through Saturday. In order to collect information on Sunday section and insert readership, about twice as many respondents were interviewed on Monday as on any other single day.

2) Yesterday's newspaper pages carried in the interviewer's kit included all newspapers with a circulation-to-household ratio of 10% or more in that locality. Respondents who had read one of the newspapers in the interviewer's kit were designated as "qualified" yesterday readers. Respondents who had read a yesterday edition not included in the interviewer's kit were treated as "past week" readers.

Field Experience

Interviews were completed with 1,174 respondents, resulting in a response rate of 65%, as follows:

Total Housing Units Assigned	1,932
Vacant, nonexistent	-135
Eligible units (= 100%)	1,797
Completed interviews	1,174
Not interviewed:	
Refusals	242
Other (Not at home, illness, etc.)	381
Total not interviewed	623

Verification

A systematic sample of approximately 15% of interviews was verified through brief telephone interviews. Verification was undertaken to determine whether the interview was actually completed with the designated respondent and to assure that it covered the appropriate subject matter. The verifications revealed no evidence of questionable work on the part of the interviewers.

Weighting

A two-stage weighting procedure was used. In the first stage each respondent was given a weight inversely proportional to his or her probability of household selection and inversely proportional to the response rate in the stratum to which his/her location was assigned. (For this survey a stratum was defined by Census region with these first-stage strata: 25 most populous MSAs, other MSAs, and non-MSA counties.)

In the second stage of balancing, sample proportions were weighted to bring them into line with 1984 Current Population Reports projections for race, Hispanic origin, age, sex, and education.

Sponsorship

Newspaper Advertising Bureau, Inc., developed the questionnaires, specified the research design, commissioned the field work and analyzed the data. This report was written by Charles Lehman of NAB's Research Department. Copies of the questionnaires and additional details on sampling and interviewing procedures are available on request.

Appendix Base Table 1

Unweighted Bases for Total Respondents, Yesterday Readers and Past Week Readers, by Demographics

	Total Respondents	Yesterday Readers*	Past Week Readers*
Total adults	1,174	613	281
By sex:			
Men	504	282	119
Women	670	331	162
By age:			
18-24 years	141	59	42
25-29 years	137	62	40
30-34 years	146	69	49
35-44 years	215	117	58
45-54 years	154	90	29
55-64 years	157	90	31
65 years or older	215	123	28
By education:			
College graduate	199	123	59
1-3 years college	241	138	70
High school graduate	420	228	92
Some high school or less	298	121	54
By occupation:			
Professional, manager	206	127	56
Technical, clerical, sales	196	110	53
Other employed	246	120	59
Not employed	494	241	107

* Bases shown for yesterday readers refer only to "qualified" readers who had read a newspaper included in the interviewer's kit. Other yesterday readers were treated as past week readers.

Appendix Base Table 2

Qualified Yesterday Readers with Employment Classification in Newspaper

	Net (Any Employment	Career Opportunities[a]
Total adult readers	593	503
By sex:		
Men	271	228
Women	322	275
By age:		
18-14 years	55	47
25-29 years	60	53
30-34 years	66	61
35-44 years	115	96
45-54 years	85	69
55-64 years	87	74
65 years or older	122	101
By education:		
College graduate	115	96
1-3 years college	133	108
High school graduate	222	194
Some high school or less	121	104
By occupation:		
Professional, manager	121	101
Technical, clerical, sales	107	90
Other employed	116	99
Not employed	235	201
By newspaper edition read yesterday:		
Weekday edition	419	334
Sunday edition	174	169

a) Label designates recruitment ads in display format.

Appendix Base Table 2 (continued)
Qualified Yesterday Readers with Employment Classification in Newspaper

	Employment Agencies	Job Listings
Total adult readers	498	593
By sex:		
Men	223	271
Women	275	322
By age:		
18-24 years	48	55
25-29 years	53	60
30-34 years	55	66
35-44 years	99	115
45-54 years	68	85
55-64 years	72	87
65 years or older	101	122
By education:		
College graduate	102	115
1-3 years college	104	133
High school graduate	185	222
Some high school or less	106	121
By occupation:		
Professional, manager	102	121
Technical, clerical, sales	89	107
Other employed	100	116
Not employed	195	235
By newspaper edition read yesterday:		
Weekday edition	341	419
Sunday edition	157	174

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Real Estate Classified:

A Study of Prospect Status, Readership & Interest.

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

REAL ESTATE CLASSIFIED:

A STUDY OF PROSPECT STATUS, READERSHIP AND INTEREST

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

December 1986

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HIGHLIGHTS

- Apart from any immediate need for housing, millions of Americans have a continuing interest in the real estate market. In this national survey, 41% say that they try to keep up with real estate trends. Interest runs highest among adults between 25 and 45 years old, people with college backgrounds and those with household incomes of $35,000 or more. (Table 1)

- Among those who like to keep up with trends, the main source for information about real estate is classified advertising in the daily and Sunday newspaper. More than six out of ten (63%) volunteer the information that they depend on the daily and Sunday papers, and especially on classified advertising, for information on the price of housing and other developments in the real estate market. (Table 2)

- More than two thirds of all Americans own their homes. Ownership falls to the 50% level or below only among single adults, people under age 30, and those with household incomes under $15,000. Eight out of ten adults who are 35 or older are homeowners, but more than half of those under 25 are renters. (Table 3)

- This national survey indicates that at any given time, only 4% of all adults are actively looking for a house to buy. Another 6% are active prospects for rentals. About 16% are not actively looking, but would consider moving if a good opportunity came along. Interest in buying a house peaks between the ages of 25 and 44, but less than 10% of this group of prime prospects is actively in the market at any given time. (Table 4)

- On an average weekday or Sunday, about one out of five newspaper readers (19%), read real estate classified advertising. Most of these readers look at two or more categories of real estate classified. The most widely read are "Homes for Sale" (14%) and "Rentals" (9%), but more specialized headings like "Co-ops, Condos" (6%), "Farms, Acreage" (6%) and "Luxury Homes and Apartments" (4%) also attract readers. (Table 5)

- Readership of real estate classified is not always tied to any need for a primary residence--3% of yesterday's newspaper readers checked advertising for "Stores and Offices", and 5% read advertising for "Vacation Homes". (Table 5)

- Browsing in the real estate classified pages can trigger action among secondary prospects and even among those who profess "no interest" in moving. In fact, people who don't describe themselves as actively looking for a house or apartment nevertheless read the real estate classified and can become interested in the advertising and decide to follow it up. (Table 6)

- The combined effects of ongoing interest in real estate and rapidly shifting prospect status make real estate classified a massive and dynamic marketplace. Estimates based on this reasearch indicate that in a single week more than 28 million Americans read the real estate classified pages. More than ten million become personally interested in one or more of the ads they read, and about four and a half million decide to follow up one or more ads. (Table 6)

- Apart from their interest in real estate, about seven out of ten adults express highly positive feelings toward classified advertising in the daily and Sunday newspaper. Using a five-point rating scale, 66% give classified advertising favorable marks for being helpful; 67%, for making it easy to find what you want: and 70%, for being a good place to advertise. 65% agree that classified advertising is "a good way to look for a house or apartment." (Table 7)

Table 1

General Interest in Information on Real Estate
(by demographics)

	Unweighted Base: = 100%	Percent Who "Try to Keep Up"
Total adults	1,174	41%
By sex:		
Men	504	43%
Women	670	38
By age:		
18-24 years	141	31%
25-29 years	137	50
30-34 years	146	53
35-44 years	215	48
45-54 years	154	45
55-64 years	157	32
65 years or older	215	32
By education:		
College graduate	199	53%
1-3 years college	241	50
High school graduate	420	41
Some high school or less	298	26
By household income:		
$35,000 and over	219	54%
$25,000 - $34,999	159	45
$15,000 - $24,999	233	47
Under $15,000	401	28
By marital status:		
Single	179	32%
Married	709	45
Separated, divorced, widowed	269	31

Question: Apart from any immediate interest you might have in buying a home, do you generally try to keep up with real estate trends, the asking price for houses in your area, and so forth?

Table 2

Main Source of Information on Real Estate

	Percent Mentioning[a]
Classified ads, daily or Sunday newspaper[b]	63%
Friends, relatives, coworkers	28
Weekly newspaper, classified	7
Magazine	5
Television, TV	3
Radio	1
All other mentions	20
Base: Those who like to "keep up" with real estate market = 100%	(465)

Question: What is your main source of information about what's going on in the real estate market? (IF NEWSPAPER MENTIONED) What part of the newspaper gives you the most information about real estate trends, housing prices, and so forth?

a) Total exceeds 100% because of multiple mentions.

b) Responses to the initial question and the probe indicate that the specific source of information was classified advertising for 56%; the business pages, for 4%; and some other part of the daily or Sunday newspaper, for 3%.

Table 3

Current Home Ownership
(by demographics)

	Own Home[a]	Rent[a]
Total adults	67%[b]	27%
By sex:		
Men	69%	26%
Women	66	29
By age:		
18-24 years	29%	53%
25-29 years	48	46
30-34 years	60	34
35-44 years	79	20
45-54 years	80	19
55-64 years	82	17
65 years or older	79	15
By education:		
College graduate	72%	24%
1-3 years college	68	30
High school graduate	67	28
Some high school or less	63	29
By household income:		
$35,000 and over	85%	11%
$25,000 - $34,999	72	23
$15,000 - $24,999	64	32
Under $15,000	50	44
By marital status:		
Single	35%	46%
Married	77	21
Separated, divorced, widowed	55	39

a) Rows do not total 100% because "other" answers and "no answer" have been excluded (6% of total responses).

b) According to the 1986 Study of Media & Markets by Simmons Market Research Bureau, 69.5% of adults own their residences.

Table 4

Real Estate Prospect Status
(by demographics)

	Active Prospect		Secondary Prospect	All Other
	Buy	Rent		
Total adults	4%	6%	16%	74%
By sex:				
Men	4%	5%	18%	73%
Women	4	6	14	76
By age:				
18-24 years	2%	20%	22%	56%
25-29 years	9	6	22	63
30-34 years	6	7	24	63
35-44 years	7	1	17	75
45-54 years	2	5	19	74
55-64 years	2	1	9	88
65 years or older	1	2	6	91
By education:				
College graduate	4%	6%	20%	70%
1-3 years college	6	5	15	74
High school graduate	4	6	15	75
Some high school or less	3	6	16	75
By household income:				
$35,000 and over	5%	3%	15%	77%
$25,000 - $34,999	5	6	17	72
$15,000 - $24,999	5	6	21	68
Under $15,000	2	8	15	75
By marital status:				
Single	2%	14%	24%	60%
Married	5	4	15	76
Separated, divorced, widowed	2	5	14	79

Base: Total respondents = 100%

(See Appendix Base Table 1 for bases.)

Table 5

Readership of Real Estate Classified Advertising Among Readers of Yesterday's Newspaper

	Net (Any Real Estate)	Homes for Sale	Rentals
Total adult readers	19%	14%	9%
By sex:			
Men	19%	15%	9%
Women	18	14	10
By age:			
18-24 years	19%	13%	13%
25-29 years	34	23	20
30-34 years	21	17	5
35-44 years	18	17	7
45-54 years	23	14	15
55-64 years	15	10	5
65 years or older	11	11	5
By education:			
College graduate	24%	19%	8%
1-3 years college	25	16	13
High school graduate	17	15	9
Some high school or less	12	8	8
By household income:			
$35,000 and over	23%	17%	13%
$25,000 - $34,999	16	13	5
$15,000 - $24,999	17	14	9
Under $15,000	12	10	5
By marital status:			
Single	21%	11%	16%
Married	21	17	9
Separated, divorced, widowed	8	4	4

Base: Qualified yesterday readers with classification in newspaper = 100%

(See Appendix Base Table 2 for unweighted bases.)

Table 5 (continued)

Readership of Real Estate Classified Advertising Among Readers of Yesterday's Newspaper

	Co-ops, Condos	Farms, Acreage	Vacation Homes
Total adult readers	6%	6%	5%
By sex:			
Men	6%	8%	6%
Women	5	4	5
By age:			
18-24 years	3%	6%	2%
25-29 years	2	11	-
30-34 years	6	3	4
35-44 years	8	4	8
45-54 years	9	8	9
55-64 years	6	7	5
65 years or older	5	5	4
By education:			
College graduate	9%	7%	6%
1-3 years college	5	6	6
High school graduate	5	5	6
Some high school or less	5	6	3
By household income:			
$35,000 and over	10%	7%	9%
$25,000 - $34,999	3	3	2
$15,000 - $24,999	6	9	4
Under $15,000	2	4	1
By marital status:			
Single	3%	5%	2%
Married	7	7	7
Separated, divorced, widowed	*	2	1

Base: Qualified readers with classification in newspaper read = 100%

(See Appendix Base Table 2 for unweighted bases.)

* Less than 0.5%.

Table 5 (concluded)

Readership of Real Estate Classified Advertising Among Readers of Yesterday's Newspaper

	Stores, Offices	Luxury Homes, Apts
Total adult readers	3%	4%
By sex:		
Men	5%	5%
Women	2	3
By age:		
18-24 years	1%	3%
25-29 years	6	-
30-34 years	1	3
35-44 years	2	4
45-54 years	7	15
55-64 years	3	3
65 years or older	2	1
By education:		
College graduate	8%	5%
1-3 years college	1	4
High school graduate	3	4
Some high school or less	2	4
By household income:		
$35,000 and over	7%	7%
$25,000 - $34,999	2	-
$15,000 - $24,999	3	4
Under $15,000	1	1
By marital status:		
Single	2%	4%
Married	4	5
Separated, divorced, widowed	-	1

Base: Qualified readers with classification in newspaper = 100%

(See Appendix Base Table 2 for unweighted bases.)

Table 6

Readership, Interest and Follow-up of Real Estate Classified
(Total U.S. adults, by prospect status)

	Total Adults	Active Prospects		Secondary Prospects	All Others
		Buy	Rent		
	(000s)	(000s)	(000s)	(000s)	(000s)
Projected totals	171,205	7,020	9,760	27,390	127,035
Readership:[a]					
Yesterday	19,200	1,670	2,780	4,250	10,500
Past week	9,500	1,280	1,510	2,560	4,150
Total for 7-day week	28,700	2,950	4,290	6,810	14,650
Interest:					
Yesterday	7,140	1,040	1,300	2,130	2,670
Past week	3,460	800	660	920	1,080
Total for 7-day week	10,600	1,840	1,960	3,050	3,750
Follow-up:					
Yesterday	3,320	765	940	1,180	435
Past week	1,305	590	230	170	315
Total for 7-day week	4,625	1,355	1,170	1,350	750

* Source for estimate of total adult population:
Simmons Market Research Bureau, 1986 Study of Media & Markets

Questions: Did you read or look at any of the ads for ______ (homes for sale, rentals, etc.)? Did you see any ads for (TYPE) that you might be interested in? Did you follow up on any of the ads you saw for (TYPE)? (If "NO") Do you intend to follow up on any of the ads you saw for (TYPE)?

a) Note that "yesterday" denotes only qualified yesterday readers. Some of these may also have read on other days during the past week, but they were not questioned about classified advertising readership on other days. In this table "past week" denotes "did not read (a newspaper in the interviewer's kit) yesterday, but read in the past week".

Table 7

General Attitudes Toward Classified Advertising
(by demographics)

	Percent with Positive Attitudes on:	
	Good way to look for House or Apartment	Helpful
Total adults	65%	66%
By sex:		
Men	62%	63%
Women	68	69
By age:		
18-24 years	64%	62%
25-29 years	71	62
30-34 years	67	71
35-44 years	61	66
45-54 years	69	73
55-64 years	68	68
65 years or older	61	64
By education:		
College graduate	65%	60%
1-3 years college	67	73
High school graduate	64	66
Some high school or less	67	68
By household income:		
\$35,000 and over	64%	68%
\$25,000 - \$34,999	70	74
\$15,000 - \$24,999	70	62
Under \$15,000	65	64
By marital status:		
Single	59%	60
Married	66	68
Separated, divorced, widowed	66	64

Question: Using this scale from one to five, with five meaning "extremely good" and one meaning "extremely poor", how would you rate classified advertising in the newspaper on: being a good way to look for a house or apartment? being helpful?

(Figures shown represent combined "4" and "5" ratings.)

Table 7 (continued)

General Attitudes Toward Classified Advertising
(by demographics)

	Percent with Positive Attitudes on:	
	Easy to Find What You Want	A Good Place to Advertise
Total adults	67%	70%
By sex:		
Men	68%	69%
Women	67	71
By age:		
18-24 years	69%	74%
25-29 years	56	72
30-34 years	67	72
35-44 years	74	71
45-54 years	75	72
55-64 years	66	68
65 years or older	64	67
By education:		
College graduate	67%	67%
1-3 years college	72	73
High school graduate	67	70
Some high school or less	67	73
By household income:		
$35,000 and over	75%	70%
$25,000 - $34,999	76	74
$15,000 - $24,999	61	70
Under $15,000	66	70
By marital status:		
Single	59%	68%
Married	70	71
Separated, divorced, widowed	64	68

Question: Using this scale from one to five, with five meaning "extremely good" and one meaning "extremely poor", how would you rate classified advertising in the newspaper on: making it easy to find what you want? being a good place to advertise things you want to sell?

(Figures shown represent combined "4" and "5" ratings.)

APPENDIX

DESCRIPTION OF RESEARCH

This report, one of three on consumer usage of classified advertising in daily and Sunday newspapers, is based on the results of a national, in-home survey of 1,174 adults conducted by Response Analysis of Princeton in the spring of 1986.

Purpose

For each of the three major categories of classified advertising (automotive, employment and real estate) the research had similar goals: to estimate the size of the classified audience on a typical weekday or Sunday and over a seven-day week; to determine the percentage of adults who are likely to be active or secondary prospects at any given time; to relate prospect status to readership of the relevant classified category and intentions to follow up on the advertising; to check the extent of continuing interest in cars, jobs and housing among the adult population; and to investigate general attitudes toward the classified medium.

Method and Sample

The research utilizes personal, in-home interviewing in one hundred primary sampling units (PSUs) across the United States (excluding Alaska and Hawaii). Response Analysis supervised sampling and stipulated the

procedures for selecting households and respondents. (Only one adult was interviewed in each household chosen.) Up to four calls, or three callbacks, were made in order to complete interviews with designated respondents.

In the screening phase of the interview, respondents were asked about their current level of interest in buying a car, finding employment, and buying or renting a house or apartment. Screening also included questions about daily and Sunday newspaper readership over the past seven days.

Respondents who reported reading yesterday's edition[1] of a daily or Sunday newspaper were shown specific classified headings in that edition and asked about their reading, interest and follow-up of ads under each heading.[2] Those who had not read yesterday's newspaper were shown a card listing the most common automotive, employment and real estate classifications and asked which of these they recalled reading the last time they had read a newspaper. The analysis of classified readership was limited to respondents reading a newspaper within the last seven days.

---

1) Interviewing was conducted Monday through Saturday. In order to collect information on Sunday section and insert readership, about twice as many respondents were interviewed on Monday as on any other single day.

2) Yesterday's newspaper pages carried in the interviewer's kit included all newspapers with a circulation-to-household ratio of 10% or more in that locality. Respondents who had read one of the newspapers in the interviewer's kit were designated as "qualified" yesterday readers. Respondents who had read a yesterday edition not included in the interviewer's kit were treated as "past week" readers.

Field Experience

Interviews were completed with 1,174 respondents, resulting in a response rate of 65%, as follows:

Total Housing Units Assigned	1,932
Vacant, nonexistent	-135
Eligible units (= 100%)	1,797
Completed interviews	1,174
Not interviewed:	
Refusals	242
Other (Not at home, illness, etc.)	381
Total not interviewed	623

Verification

A systematic sample of approximately 15% of interviews was verified through brief telephone interviews. Verification was undertaken to determine whether the interview was actually completed with the designated respondent and to assure that it covered the appropriate subject matter. The verifications revealed no evidence of questionable work on the part of the interviewers.

Weighting

A two-stage weighting procedure was used. In the first stage each respondent was given a weight inversely proportional to his or her probability of selection and inversely proportional to the response rate in the stratum to which his/her location was assigned. (For this survey a stratum was defined by Census region with first-stage strata: 25 most populous MSAs, other MSAs, and non-MSA counties.)

In the second stage of balancing, sample proportions were weighted to bring them into line with 1984 Current Population Reports projections for race, Hispanic origin, age, sex, and education.

Sponsorship

Newspaper Advertising Bureau, Inc., developed the questionnaires, specified the research design, commissioned the field work and analyzed the data. This report was written by Charles Lehman of NAB's Research Department. Copies of the questionnaires and additional details on sampling and interviewing procedures are available on request.

Appendix Base Table 1

Unweighted Bases for Total Respondents, Yesterday Readers and Past Week Readers, by Demographics

	Total Respondents	Yesterday Readers*	Past Week Readers*
Total adults	1,174	613	281
By sex:			
Men	504	282	119
Women	670	331	162
By age:			
18-24 years	141	59	42
25-29 years	137	62	40
30-34 years	146	69	49
35-44 years	215	117	58
45-54 years	154	90	29
55-64 years	157	90	31
65 years or older	215	123	28
By education:			
College graduate	199	123	59
1-3 years college	241	138	70
High school graduate	420	228	92
Some high school or less	298	121	54
By household income:			
$35,000 and over	219	152	51
$25,000 - $34,999	159	99	39
$15,000 - $24,999	233	125	63
Under $15,000	401	159	89
By marital status:			
Single	179	88	49
Married	709	392	171
Separated, divorced, widowed	269	125	59

* Bases shown for yesterday readers refer only to "qualified" readers who had read a newspaper included in the interviewer's kit. Other yesterday readers were treated as past week readers.

Appendix Base Table 2

Qualified Yesterday Readers with Real Estate Classification in Newspaper

	Net (Any Real Estate)	Homes for Sale	Rentals
Total adult readers	593	592	593
By sex:			
Men	271	270	271
Women	322	322	322
By age:			
18-24 years	55	55	55
25-29 years	60	60	60
30-34 years	66	66	66
35-44 years	115	115	115
45-54 years	85	85	85
55-64 years	87	86	87
65 years or older	122	122	122
By education:			
College graduate	115	115	115
1-3 years college	133	132	133
High school graduate	222	222	222
Some high school or less	121	121	121
By household income:			
$35,000 and over	142	142	142
$25,000 - $34,999	96	95	96
$15,000 - $24,999	122	122	122
Under $15,000	155	155	155
By marital status:			
Single	84	84	84
Married	378	377	378
Separated, divorced, widowed	124	124	124

(All bases shown are unweighted.)

Appendix Base Table 2 (continued)

Qualified Yesterday Readers with Real Estate Classification in Newspaper

	Co-ops, Condominiums	Farms and Acreage	Vacation Homes
Total adult readers	543	577	552
By sex:			
Men	250	267	255
Women	293	310	297
By age:			
18-24 years	52	54	52
25-29 years	59	60	55
30-34 years	63	64	64
35-44 years	103	114	108
45-54 years	75	80	76
55-64 years	78	84	83
65 years or older	111	118	111
By education:			
College graduate	109	110	110
1-3 years college	119	132	123
High school graduate	202	216	206
Some high school or less	111	118	111
By household income:			
$35,000 and over	125	136	132
$25,000 - $34,999	89	95	87
$15,000 - $24,999	114	119	117
Under $15,000	142	150	141
By marital status:			
Single	78	83	80
Married	345	366	354
Separated, divorced, widowed	113	122	111

(All bases shown are unweighted.)

Appendix Base Table 2 (concluded)

Qualified Yesterday Readers with Real Estate Classification in Newspaper

	Stores, Offices	Luxury Homes & Apartments
Total adult readers	584	373
By sex:		
Men	267	167
Women	317	206
By age:		
18-24 years	53	42
25-29 years	60	39
30-34 years	66	41
35-44 years	111	77
45-54 years	85	51
55-64 years	86	52
65 years or older	120	70
By education:		
College graduate	115	77
1-3 years college	132	88
High school graduate	218	134
Some high school or less	117	73
By household income:		
$35,000 and over	141	87
$25,000 - $34,999	96	50
$15,000 - $24,999	118	89
Under $15,000	151	97
By marital status:		
Single	84	57
Married	371	235
Separated, divorced, widowed	122	76

(All bases shown are unweighted.)

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How Readers Feel About ROP Color

1986 National Survey

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

1986 NATIONAL SURVEY:

HOW READERS FEEL ABOUT ROP COLOR

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

December, 1986

Newspaper Advertising Bureau, Inc.

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EXECUTIVE SUMMARY

In a national survey of 1000 adults conducted in August, 1986, by TeleNation, Market Facts, Inc., for the Newspaper Advertising Bureau, respondents were asked:

> To rate the printing quality of articles and pictures in the newspaper they read most often
>
> How often they see pictures, charts, or ads in color in that paper
>
> How they rate the color in their usual paper
>
> Whether they want color in ads and/or in other parts of the paper

- Do they want color?

  Three out of four adults (74%) want color in their newspaper.

  The younger they are, the more likely they are to want color-- 90% of those in the 18-24 age group want color.

  The more color they see, the more they want it. 88% of those who see it almost every time want color.

  Even among those who never see color in their newspapers, 60% would like to.

- Where do they want it?

  Most of those who want color want it in both editorial and advertising.

- How good do they think the color is?

  Two-thirds of those who ever see color in their papers are pleased with the quality of the color.

  Those who see color more frequently are more pleased with the quality of the color.

  Younger adults are more critical of the quality of the color they see.

- Color and overall printing quality

  57% of all readers say that the printing in their paper is "very clear."

  This rises to 65% of readers who see color every time they read the paper. That is, papers that print color all the time do a better job of overall printing quality.

  Younger adults are more critical of the overall printing quality, as well as of the color in their papers.

- How much color are they aware of?

  NAB's 1983 editorial inventory reported that 86% of U.S. daily circulation were using editorial color. But 25% of the respondents in 1986 said they never see color in their newspaper.

  This suggests that some papers may not be using enough color to lead readers to think they have any color at all.

- Conclusion

  The survey provides a clear public preference for color:

  > Readers want more color.
  >
  > The younger they are, the more they want it.
  >
  > The younger they are, the higher their standards.
  >
  > The papers that give them more color have higher ratings for reproduction quality and for overall printing clarity.

FINDINGS

Do they want color?

After asking about the overall quality of reproduction in their paper, and about how much color they see and how they rate it, all respondents were asked whether and where they would like color in their newspaper, if they could have one "made up exactly the way they wanted it at no extra cost."

Three out of four adults want color in their newspaper, and the younger they are the more likely they are to want color. The proportions rise from 53% of the oldest segment to 90% of those in the 19-24 age group.

Table 1: Preference for Color, by Age

	Want color[a]	No color	Don't know	Bases
Total	74%	20%	6%	(1000)
18-24	90	9	1	(168)
25-34	79	17	4	(241)
35-44	75	18	7	(177)
45-54	72	19	9	(134)
55-64	66	26	8	(132)
65+	53	36	11	(148)

Question: "Suppose that you could have a daily newspaper made up exactly the way you wanted it at no extra cost. Would you rather have a daily paper with no color at all, or color only in the ads, or color only in the other parts of the paper, or color in both the ads and the other parts of the paper?"

[a] The category "want color" comprises those who want color in ads, or editorial, or both. (Since the term "editorial" in its broad sense would not be meaningful to the general public, the question asked about ads vs. "other parts of the paper.")

The more accustomed people are to seeing color in their papers, the more likely they are to want color. Almost nine out of ten (88%) of those who now see color almost every time they read a paper, do want it. But even among those who never see color, 60% would like to have it.

Moreover, the desire for color is widely prevalent, regardless of how good their newspaper color is.

Table 2: Preference for Color, by Present Exposure or Quality

By: How often they now see color	% in each group wanting color	Bases
Almost every time	88%	(104)
Half the time	85%	(202)
Less than half	75%	(415)
Never	60%	(261)
By: How they rate the color they see		
Excellent, good	83%	(480)
So-so, poor, very poor	77%	(243)

Where do they want color?

A strong majority of those who opt for color in their newspaper want it throughout the paper. Among the 74% who want color, 47%--or two thirds--want it in both editorial and advertising.

This preference for color throughout the paper prevails in all age groups under 55. The older people are more likely than younger ones to want color only in ads.

Table 3: Where They Want Color, by Age

	Total adults	By age	
		18-54	55+
Want color throughout	47%	55%	26%
Only in ads	16	13	22
Only in 'editorial'	11	11	11
Sub-total, want color	74%	79%	59%

The strong preference for color throughout the paper holds, regardless of how much color readers now see in their usual paper and regardless of how good they think that color is. In every group, well over half of those who want color want it in both editorial and ads.

Table 4: Where They Want Color, by Present Exposure or Quality

	Sub-total want color	Want color throughout	Ads only	Edit. only
By: How often they now see color				
Almost every time	88%	63	9	16
Half the time	85%	56	18	11
Less than half	75%	44	19	12
Never	60%	42	12	6
By: How they rate the color they see				
Excellent, good	83%	49	19	15
So-so, poor, very poor	77%	50	16	11

How good do they think the color is?

Two thirds of the readers who ever see color in their paper are satisfied with the quality of the color: 54% say it is "good" and 12% say it is "excellent." This leaves fully one-third (34%) who do not give high marks to the color they see.

Since it is to be assumed that papers that do more color also provide better color quality, it is not surprising that readers who see color more frequently are more satisfied with it. The proportion who say that it is "excellent" rises from 8% of those who see it less than half the time, to 23% of those who see color every time they read their paper.

Table 5: Readers' Rating of Their Newspaper's Color, by How Often They See Color

	Total[a]	See color every time	Half the time	Less than half
Excellent	12%	23%	14%	8%
Good	54	56	62	51
So-so	27	14	21	33
Poor, very poor	7	7	3	8
	100%	100%	100%	100%
Bases	(721)	(104)	(202)	(415)

a) This question was asked only of those who ever see color in their newspaper.

Younger adults are more critical of the quality of the ROP color that they see. Among those who are under 35, two out of five (42%) say the color is only "so-so" or even "poor" or "very poor." The implication is that having grown up with good color in other media, and with greater sophistication about color photography, they are less tolerant of the growing pains visible in ROP color.

Table 6: Color Ratings, by Age

	<35	35+
Excellent	7%	15%
Good	41	48
So-so	34)42%	21
Poor, very poor	8)	6
	100%	100%
Bases:	(306)	(415)

Color and overall printing quality

On the whole, the American public gives the daily newspaper high ratings on reproduction quality. Before asking respondents anything about newspaper color, they were first asked to rate the clarity of printing in their newspapers. 56% say that the printing of articles and pictures in the paper they read most often is "very clear," and an additional 37% rate it as "fairly clear."

Younger adults are more critical of the overall reproduction quality, as they are with regard to the quality of the color in their paper.

Table 7: Rating of Overall Reproduction Quality, by Age

	Total Adults	By Age	
		<35	35+
Very clear	56%	50%	61%
Fairly clear	37	42	33
A little blurred	5	6	3
Very blurred	1	*	1
Don't know	1	1	2
	100%	100%	100%
Bases:	(1000)	(409)	(591)

* Less than .5%

Question: "Thinking about the paper you read most often, how clear is the printing of the articles and pictures?"

Newspaper people are aware that newspapers which upgrade their equipment, not only improve their color capacity and quality, they also improve the reproduction quality of their black and white. This survey shows that the nation's readers recognize the improved black and white reproduction that has accompanied the provision of color.

Readers who see color very frequently give higher ratings to the overall reproduction in their papers: 65% say the printing is very clear, compared with 53% of those who see color less than half the time.

Table 8: Overall Reproduction Rating, by Amount of Color They See

By: How often they see color:	Overall printing rated "very clear"
Almost every time	65%
About half the time	62%
Less than half	53%
Never see color	56%

An even closer correlation appears between how good they think the color is and how clear they find the printing. 78% of those who say the color is excellent say the printing is very clear, compared with only 33% of those who say the color is poor or very poor. This suggests not only that papers that do good color also do better black and white; it also suggests that the quality of the color affects their judgment of the overall quality of the printing.

Table 9: Overall Reproduction Rating, by Quality of the Color

By: How good the color is:	Overall printing rated "very clear"
Excellent	78%
Good	63%
So-so	44%
Poor, very poor	33%

How much color are they aware of?

Among those who reported reading a newspaper at least once a week, less than one-third said they see pictures, charts or ads in color "about half the time" or more often. 25% say they never see color in their daily newspaper.

Table 10: How Often Color is Seen

Almost every time I read	10%
About half the time	21
Less than half the time	44
Never	25
	100%
Base[a]	(890)

a) Excludes those who did not answer, and those who did not report reading a newspaper at least once a week.

How closely does this match the circulation figures for papers that are using color? NAB periodically conducts a questionnaire survey of all U.S. dailies, to obtain an inventory of their editorial contents. In 1983 the use of editorial color was reported for 86% of total daily circulation, and it can be assumed that the amount of color has increased since then. Furthermore, NAB's analysis of SRDS data on color offered to advertisers shows that papers representing 93% of total circulation offer at least one color in ROP.

Why, then, do only 75% of the nation's adult readers report being aware of color in their usual newspaper? To be sure, there are people who cannot discriminate among certain colors. But this short-fall in the number of readers who are aware of ROP color suggests that some papers still use so little color, that readers don't think of it as *color*.[1]

Table 11: How Much Color There Is, and How Much Readers See

Use of editorial color, 1983:	86% of circ.
Available ROP ad color, 1985:	93% of circ.
Awareness of ROP color, 1986:	75% of readers

---

1) This problem of awareness exists to a much greater extent among advertisers. In a 1984 survey of 400 advertising executives conducted by Neal Associates, for NAB, only 16% knew that almost all papers offer ROP full color.

Conclusion

This survey makes it clear that the public, like advertisers, wants ROP color. And the younger they are, the more they want color.

Not only do readers want color, they want it throughout the paper, not just in advertising.

But newspapers have a way to go to satisfy the nation's readers' color standards. One out of three adults are critical of the quality of the color they see. And the younger they are, the higher their standards.

The papers that give them more color receive higher ratings for color and overall reproduction quality. And the papers that give them better color are rated better for overall printing clarity.

In asking for more color, readers are sending the same message as advertisers.

* * * * * * *

The questionnaire was designed by Charles Lehman and Thelma Anderson of NAB's Research and Marketing/New Technology Departments. This report was written by Thelma Anderson.

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Daily Newspaper Page Opening:

Page and Sections Usually Read

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DAILY NEWSPAPER PAGE OPENING:

PAGES AND SECTIONS USUALLY READ

Demographic Segments

SMRB SMM - 1986

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

January 1987

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Types of Daily Newspaper Pages or Sections Usually Read by:	Table Number for: Adults	Males	Females
Total Average Weekday Audience	1	1	1
Age	2	3	4
Education	5	6	7
Household Income	8	9	10
Employment Status	11	12	13
Occupation	14	15	16
Marital Status	17	18	19
Number of People in Household	20	21	22
Locality Type	23	24	25
Census Region	26	27	28

INTRODUCTORY NOTE

Measures of media exposure vary with the approach to measurement, whether the medium in question is print or broadcast. For this reason, users of media exposure figures should understand exactly how the data are collected.

The figures in this report are from the 1986 Simmons Study of Media and Markets. They were obtained in personal interviews with a multi-stage area probability sample of more than 19,000 adults. Every respondent who reported reading one or more daily newspapers within the past seven days was asked:

> "When you read or look into (NAME NEWSPAPER), do you generally read or look at every page of the entire newspaper, or do you tend to read or look at only some pages or sections?"

Those who say that they read or look at "only some pages or sections" were shown a card listing ten categories of content carried by the great majority of daily newspapers, as shown in the tables following, and asked:

> "Which of the numbers on this card describe the pages or sections in (NAME NEWSPAPER) you generally read or look at?"

The most important finding emerging from this approach is that more than six out of ten adult readers (63%)[1] indicate that they usually see every page of the newspaper they read. This does not mean that they read every item, but since the human eye is a very efficient scanning device, they have the opportunity to be exposed to any editorial or advertising content appearing in the issue.

---

[1] Research by Audits & Surveys, Inc. (1982) reported that 67% of adult readers go through the paper "page by page".

In a 1982 study conducted by Audits & Surveys, Inc., a nationwide sample of adults was taken through sampled pages of newspapers read on the day before the interview. Findings from the A&S study suggest that the SMRB figures in the present report are roughly equivalent to "page opening". Overall, A&S estimated average page opening at 77%--that is, the average page (or spread) in a daily newspaper is opened by 77% of all those reading the issue.

For the minority who were directly questioned by SMRB's interviewers about specific kinds of content, the figures obtained represent a more rigorous measure of "readership". Those who wish to estimate how these more selective readers respond to particular kinds of content can do so by subtracting the percentage shown for "usually read every page" and then dividing by "read certain pages or sections".

EXAMPLE: In the first column of Table 1, the figure shown for "business, finance" is 76%. Subtracting the 63% who usually read every page leaves a remainder of 13%. Dividing this by the 37% who read only certain pages or sections yields 35%, the proportion of those specifically asked about "business, finance" who say that they usually read that page or section. The proportions for selective male (41%) and female (32%) readers indicate a larger difference between the sexes than the overall "readership" or "page opening" figure suggests.

Within any given demographic segment the figures shown in these tables may reasonably be assumed to show the relative level of interest in a specific kind of content. However, any differences found between demographic segments should be interpreted with caution, because the major factor in most of these differences is the percentage who report reading every page. For example, Table 2 might appear to suggest that adults who are 65 or older are just as interested in "entertainment" pages as young adults between 18 and 24. This is only because older readers are more likely to report reading every page.

The fairly constant level of page opening for "entertainment" content shown in these SMRB tables might be contrasted with one of the results of a card-sorting task in the 1982 A&S research. The 25 cards used included 21 kinds of editorial content and four kinds of ads. In response to this part of the survey 89% of all newspaper readers between 18 and 24 indicate that they usually read "movie ads", as compared with only 24% of those who are 65 or older. This pattern of higher interest in movie ads among young adults is consistent with other research on movie attendance.

Although different approaches to measuring the elusive concept called "readership" may yield very different results, divergent findings can be equally valuable so long as the user understands exactly how those results were obtained and what they imply.

In Tables 23 through 25, the percentages shown for "usually read every page" reflect the fact that most of the dailies read in central cities tend to have more pages than those read in non-metropolitan areas. Large central city newspapers also have more specialized pages and sections that may be designed to appeal to fairly narrow audience segments. The Audits and Surveys study cited earlier indicates that the average central city reader may open to more pages than the average non-metropolitan reader has in his entire newspaper.

Table 1

Types of Daily Newspaper Pages or Sections Usually Read
(Total adult readers, by sex)

	Adults	Males	Females
Usually read every page	63%	63%	62%
Read certain pages or sections	37	37	38
Business, finance	76	78	74
Classified	76	76	76
Comics	76	76	77
Editorial page	78	77	79
Entertainment	80	77	84
Food, cooking	77	71	82
General news	92	92	93
Home furnishings, gardening	74	71	78
Sports	80	88	72
TV, radio listings	76	75	78
Projected base: Average weekday audience (in 000s)	(107,753)	(52,597)	(55,156)

Source: SMRB, 1986 Study of Media & Markets

Table 2

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by age)

	18-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Year	65 Yrs & Over
Usually read every page	51%	59%	64%	63%	69%	69%
Read certain pages or sections	49	41	36	37	31	31
Business, finance	65	74	77	79	82	80
Classified	72	75	77	76	78	77
Comics	72	75	76	75	80	81
Editorial page	64	74	79	79	84	85
Entertainment	77	79	81	80	83	83
Food, cooking	63	73	78	78	83	84
General news	85	91	93	93	95	95
Home furnishings, improvement	62	72	75	75	80	81
Sports	77	78	80	80	85	81
TV, radio listings	68	73	76	76	81	83
Projected base: Average Weekday Audience (in 000s)	(14,815)	(23,480)	(20,379)	(15,323)	(16,195)	(17,560)

Source: SMRB, 1986 Study of Media & Markets

Table 3

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by age)

	18-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65 Yrs & Over
Usually read every page	49%	61%	65%	62%	70%	70%
Read certain pages or sections	51	39	35	38	30	30
Business, finance	66	76	81	80	85	83
Classified	69	77	77	74	79	77
Comics	69	75	75	74	81	81
Editorial page	61	74	79	77	84	85
Entertainment	71	76	77	76	81	80
Food, cooking	57	69	72	72	78	78
General news	83	90	93	92	95	96
Home furnishings, gardening	56	69	72	70	79	77
Sports	85	88	88	88	91	88
TV, radio listings	64	73	75	73	81	82
Projected base: Average weekday audience (in 000s)	(7,705)	(12,346)	(10,292)	(7,351)	(7,592)	(7,311)

Source: SMRB, 1986 Study of Media & Markets

Table 4

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by age)

	18-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65 Yrs & Over
Usually read every page	53%	57%	63%	64%	68%	69%
Read certain pages or sections	47	43	37	36	32	31
Business, finance	65	71	74	77	79	77
Classified	74	72	77	78	77	77
Comics	75	74	77	76	80	81
Editorial page	65	75	79	81	84	85
Entertainment	83	82	85	83	84	85
Food, cooking	69	77	83	84	87	88
General news	88	92	93	93	94	95
Home furnishings, gardening	68	75	77	80	82	84
Sports	67	68	71	72	79	76
TV, radio listings	72	74	78	78	81	84
Projected base: Average weekday audience (in 000s)	(7,111)	(11,134)	(10,087)	(7,972)	(8,603)	(10,249)

Source: SMRB, 1986 Study of Media & Markets

Table 5

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by education)

	College Graduate	1-3 Yrs College	High School Graduate	Some High School or Less
Usually read every page	62%	61%	64%	62%
Read certain pages or sections	38	39	36	38
Business, finance	83	76	75	72
Classified	73	75	77	76
Comics	75	76	78	76
Editorial page	81	76	78	74
Entertainment	82	80	82	77
Food, cooking	76	74	79	76
General news	95	93	92	89
Home furnishings, gardening	74	72	76	72
Sports	81	79	80	79
TV, radio listings	75	74	78	76
Projected base: Average weekday audience (in 000s)	(22,494)	(21,018)	(43,530)	(20,711)

Source: SMRB, 1986 Study of Media & Markets

Table 6

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by education)

	College Graduate	1-3 Yrs College	High School Graduate	Some High School or Less
Usually read every page	63%	62%	64%	61%
Read certain pages or sections	37	38	36	39
Business, finance	86	79	75	72
Classified	74	76	77	75
Comics	75	75	77	73
Editorial page	81	75	76	72
Entertainment	78	76	78	73
Food, cooking	72	70	72	69
General news	95	92	91	88
Home furnishings, gardening	72	69	72	68
Sports	88	87	90	86
TV, radio listings	74	72	77	73
Projected base: Average weekday audience (in 000s)	(13,145)	(10,469)	(19,430)	(9,553)

Source: SMRB, 1986 Study of Media & Markets

Table 7

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by education)

	College Graduate	1-3 Yrs College	High School Graduate	Some High School or Less
Usually read every page	59%	60%	64%	60%
Read certain pages or sections	41	40	36	36
Business, finance	77	73	74	71
Classified	72	75	77	78
Comics	75	77	78	80
Editorial page	82	77	79	80
Entertainment	86	83	85	76
Food, cooking	82	79	84	82
General news	94	93	93	95
Home furnishings, gardening	78	76	80	79
Sports	72	70	73	74
TV, radio listings	78	75	80	78
Projected base: Average weekday audience (in 000s)	(9,349)	(10,550)	(24,100)	(11,255)

Source: SMRB, 1986 Study of Media & Markets

Table 8

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by household income)

	$50,000 & Over	$40,000 & Over	$30,000 & Over	$20,000-$29,999	Under $20,000
Usually read every page	62%	62%	62%	63%	63%
Read certain pages or sections	38	38	38	37	37
Business, finance	82	80	78	75	73
Classified	75	75	75	76	76
Comics	74	74	75	76	78
Editorial page	79	78	78	78	77
Entertainment	81	81	81	80	80
Food, cooking	75	75	76	77	77
General news	93	93	93	93	90
Home furnishings, gardening	74	73	74	75	75
Sports	80	81	81	79	79
TV, radio listings	74	75	75	77	78
Projected base: Average weekday audience (in 000s)	(18,351)	(32,306)	(50,839)	(23,086)	(33,828)

Source: SMRB, 1986 Study of Media & Markets

Table 9

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by household income)

	$50,000 & Over	$40,000 & Over	$30,000 & Over	$20,000-$29,999	Under $20,000
Usually read every page	62%	62%	62%	64%	64%
Read certain pages or sections	38	38	38	36	36
Business, finance	86	83	81	77	74
Classified	75	75	75	77	77
Comics	73	73	74	77	78
Editorial page	78	77	77	77	76
Entertainment	76	76	77	78	76
Food, cooking	70	70	70	73	71
General news	92	92	92	93	90
Home furnishings, gardening	69	69	69	73	71
Sports	88	88	88	88	88
TV, radio listings	73	72	73	76	77
Projected base: Average weekday audience (in 000s)	(10,433)	(17,846)	(26,823)	(11,548)	(14,227)

Source: SMRB, 1986 Study of Media & Markets

Table 10

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by household income)

	$50,000 & Over	$40,000 & Over	$30,000 & Over	$20,000-$29,999	Under $20,000
Usually read every page	62%	62%	62%	61%	63%
Read certain pages or sections	38	38	38	39	37
Business, finance	77	77	75	73	72
Classified	75	75	75	76	76
Comics	77	77	76	76	79
Editorial page	80	80	80	79	78
Entertainment	87	86	85	83	82
Food, cooking	82	82	82	82	82
General news	94	95	94	93	91
Home furnishings, gardening	80	79	79	77	77
Sports	70	73	72	70	73
TV, radio listings	77	78	78	78	79
Projected base: Average weekday audience (in 000s)	(7,919)	(14,820)	(24,017)	(11,538)	(19,601)

Source: SMRB, 1986 Study of Media & Markets

Table 11

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by employment status)

	Total Employed	Full Time	Part Time	Not Employed
Usually read every page	61%	61%	63%	65%
Read certain pages or sections	39	39	37	35
Business, finance	76	76	74	77
Classified	75	75	76	77
Comics	75	75	77	79
Editorial page	76	76	76	80
Entertainment	79	79	82	82
Food, cooking	74	74	76	81
General news	92	92	92	93
Home furnishings, gardening	73	72	75	77
Sports	80	80	78	80
TV, radio listings	75	74	76	79
Projected base: Average weekday audience (in 000s)	(68,088)	(59,757)	(8,331)	(39,665)

Source: SMRB, 1986 Study of Media & Markets

Table 12

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by employment status)

	Employed[a]	Not Employed
Usually read every page	62%	65%
Read certain pages or sections	37	32
Business, finance	78	78
Classified	75	77
Comics	75	77
Editorial page	76	78
Entertainment	77	78
Food, cooking	70	73
General news	92	92
Home furnishings, gardening	70	72
Sports	88	88
TV, radio listings	74	77
Projected base: Average weekday audience (in 000s)	(38,086)	(14,511)

Source: SMRB, 1986 Study of Media & Markets

a) "Full time" and "part time" breaks excluded because of small base for part-time workers.

Table 13

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by employment status)

	Total Employed	Full Time	Part Time	Not Employed
Usually read every page	60%	59%	65%	66%
Read certain pages or sections	40	41	35	34
Business, finance	73	72	75	76
Classified	75	74	78	77
Comics	75	75	79	80
Editorial page	76	76	79	82
Entertainment	83	82	86	85
Food, cooking	79	78	82	85
General news	92	92	94	93
Home furnishings, gardening	76	75	79	80
Sports	70	68	75	75
TV, radio listings	76	75	79	81
Projected base: Average weekday audience (in 000s)	(30,002)	(24,069)	(5,932)	(25,154)

Source: SMRB, 1986 Study of Media & Markets

Table 14

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by occupation)

	Professional, Manager	Technical, Clerical, Sales	Precision, Craft	Other Employed
Usually read every page	62%	59%	62%	61%
Read certain pages or sections	38	41	38	39
Business, finance	83	74	74	71
Classified	73	74	78	77
Comics	75	75	77	75
Editorial page	81	75	76	72
Entertainment	80	81	77	77
Food, cooking	76	75	72	72
General news	94	92	90	90
Home furnishings, gardening	74	73	72	70
Sports	81	76	87	82
TV, radio listings	75	74	75	74
Projected base: Average weekday audience (in 000s)	(19,942)	(22,576)	(8,378)	(17,192)

Source: SMRB, 1986 Study of Media & Markets

Table 15

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by occupation)

	Professional, Manager	Technical, Clerical Sales	Precision, Craft	Other Employed
Usually read every page	65%	60%	61%	61%
Read certain pages or sections	35	40	39	39
Business, finance	87	78	74	71
Classified	75	73	77	75
Comics	74	75	76	75
Editorial page	81	75	75	72
Entertainment	78	76	77	75
Food, cooking	73	68	70	69
General news	94	91	90	89
Home furnishings, gardening	72	69	71	68
Sports	87	88	89	89
TV, radio listings	74	72	75	73
Projected base: Average weekday audience (in 000s)	(11,825)	(8,676)	(7,126)	(10,459)

Source: SMRB, 1986 Study of Media & Markets

Table 16

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by occupation)

	Professional, Manager	Technical, Clerical, Sales	Other Employed
Usually read every page	59%	59%	61%
Read certain pages or sections	41	41	39
Business, finance	76	72	71
Classified	71	75	79
Comics	75	75	77
Editorial page	80	75	74
Entertainment	84	84	79
Food, cooking	80	79	77
General news	94	92	91
Home furnishings, gardening	77	76	74
Sports	72	68	70
TV, radio listings	76	76	76
Projected base: Average weekday audience (in 000s)	(8,116)	(13,900)	(7,986)

Source: SMRB, 1986 Study of Media & Markets

Table 17

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by marital status)

	Single	Married	Widowed, Divorced, Separated
Usually read every page	55%	64%	66%
Read certain pages or sections	45	36	34
Business, finance	70	78	77
Classified	72	76	78
Comics	73	76	80
Editorial page	69	79	81
Entertainment	79	80	83
Food, cooking	68	78	81
General news	88	93	92
Home furnishings, gardening	66	76	78
Sports	79	81	78
TV, radio listings	71	77	80
Projected base: Average weekday audience (in 000s)	(21,611)	(68,108)	(18,034)

Source: SMRB, 1986 Study of Media & Markets

Table 18

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by marital status)

	Single	Married	Widowed, Divorced, Separated
Usually read every page	55%	65%	66%
Read certain pages or sections	45	35	34
Business, finance	71	81	78
Classified	72	76	78
Comics	72	76	79
Editorial page	68	79	80
Entertainment	75	77	80
Food, cooking	64	73	74
General news	87	93	91
Home furnishings, gardening	63	73	74
Sports	87	89	89
TV, radio listings	69	76	78
Projected base: Average weekday audience (in 000s)	(12,211)	(35,279)	(5,108)

Source: SMRB, 1986 Study of Media & Markets

Table 19

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by marital status)

	Single	Married	Widowed, Divorced, Separated
Usually read every page	54%	63%	66%
Read certain pages or sections	46	37	34
Business, finance	67	75	77
Classified	73	75	78
Comics	75	77	80
Editorial page	70	80	82
Entertainment	83	84	84
Food, cooking	72	84	83
General news	89	93	93
Home furnishings, gardening	70	79	79
Sports	69	72	74
TV, radio listings	73	78	81
Projected base: Average weekday audience (in 000s)	(9,400)	(32,829)	(12,926)

Source: SMRB, 1986 Study of Media & Markets

Table 20

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by number of people in household)

	One	Two	Three-Four	Five or More
Usually read every page	66%	65%	60%	62%
Read certain pages or sections	34	35	40	38
Business, finance	78	78	74	74
Classified	77	76	75	76
Comics	81	78	75	76
Editorial page	83	80	75	75
Entertainment	84	81	80	78
Food, cooking	81	79	74	75
General news	94	94	91	91
Home furnishings, gardening	79	77	72	72
Sports	80	80	79	81
TV, radio listings	81	78	74	75
Projected base: Average weekday audience (in 000s)	(11,986)	(34,839)	(44,067)	(16,861)

Source: SMRB, 1986 Study of Media & Markets

Table 21

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by number of people in household)

	One	Two	Three-Four	Five or More
Usually read every page	66%	66%	60%	62%
Read certain pages or sections	34	34	40	38
Business, finance	80	82	76	77
Classified	77	77	74	76
Comics	79	78	73	75
Editorial page	81	79	76	75
Entertainment	81	79	76	75
Food, cooking	75	74	68	69
General news	93	93	90	91
Home furnishings, gardening	75	73	68	68
Sports	88	88	88	90
TV, radio listings	80	77	72	73
Projected base: Average weekday audience (in 000s)	(4,387)	(17,263)	(22,150)	(8,797)

Source: SMRB, 1986 Study of Media & Markets

Table 22

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by number of people in household)

	One	Two	Three-Four	Five or More
Usually read every page	66%	64%	60%	62%
Read certain pages or sections	34	36	40	38
Business, finance	78	75	72	72
Classified	77	75	76	75
Comics	82	77	76	77
Editorial page	84	80	77	76
Entertainment	85	84	84	81
Food, cooking	85	83	80	81
General news	94	94	92	92
Home furnishings, gardening	82	80	76	76
Sports	76	73	70	72
TV, radio listings	82	79	76	76
Projected base: Average weekday audience (in 000s)	(7,599)	(17,576)	(21,918)	(8,063)

Source: SMRB, 1986 Study of Media & Markets

Table 23

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by locality type)

	Central City	Metro-Suburban	Non-Metropolitan
Usually read every page	60%	63%	66%
Read certain pages or sections	40	37	34
Business, finance	74	78	75
Classified	73	76	79
Comics	77	75	79
Editorial page	78	77	78
Entertainment	81	80	79
Food, cooking	76	77	77
General news	91	93	93
Home furnishings, gardening	73	74	75
Sports	80	80	81
TV, radio listings	76	76	78
Projected base: Average weekday audience (in 000s)	(33,533)	(52,431)	(21,790)

Source: SMRB, 1986 Study of Media & Markets

Table 24

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by locality type)

	Central City	Metro-Suburban	Non-Metropolitan
Usually read every page[a]	59%	64%	66%
Read certain pages or sections	41	36	34
Business, finance	77	80	76
Classified	73	76	79
Comics	76	75	77
Editorial page	78	76	75
Entertainment	78	77	74
Food, cooking	71	72	70
General news	92	92	91
Home furnishings, gardening	70	71	70
Sports	88	88	89
TV, radio listings	75	74	75
Projected base: Average weekday audience (in 000s)	(16,189)	(26,034)	(10,375)

Source: SMRB, 1986 Study of Media & Markets

a) See final paragraph of "Introductory Note".

Table 25

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by locality type)

	Central City	Metro-Suburban	Non-Metropolitan
Usually read every page	60%	62%	66%
Read certain pages or sections	40	38	34
Business, finance	72	75	75
Classified	74	75	79
Comics	78	76	80
Editorial page	78	79	80
Entertainment	84	84	84
Food, cooking	81	82	84
General news	91	93	94
Home furnishings, gardening	76	78	80
Sports	72	71	74
TV, radio listings	77	78	80
Projected base: Average weekday audience (in 000s)	(17,344)	(26,397)	(11,415)

Source: SMRB, 1986 Study of Media & Markets

Table 26

Types of Daily Newspaper Pages or Sections Usually Read
(Adult readers, by census region)

	Northeast	Midwest	South	West
Usually read every page	73%	66%	54%	58%
Read certain pages or sections	27	34	46	42
Business, finance	81	77	75	71
Classified	80	77	75	69
Comics	86	78	69	73
Editorial page	88	78	72	72
Entertainment	89	80	77	74
Food, cooking	88	76	73	68
General news	94	93	90	93
Home furnishings, gardening	86	76	68	66
Sports	88	81	76	75
TV, radio listings	87	77	70	70
Projected base: Average weekday audience (in 000s)	(27,113)	(28,096)	(33,716)	(18,828)

Source: SMRB, 1986 Study of Media & Markets

Table 27

Types of Daily Newspaper Pages or Sections Usually Read
(Male readers, by census region)

	Northeast	North Central	South	West
Usually read every page	74%	66%	54%	58%
Read certain pages or sections	26	34	46	42
Business, finance	82	80	77	73
Classified	80	77	74	71
Comics	87	78	67	72
Editorial page	89	77	70	70
Entertainment	89	76	72	71
Food, cooking	85	70	65	64
General news	95	92	88	92
Home furnishings, gardening	85	71	63	63
Sports	93	89	86	84
TV, radio listings	87	76	67	68
Projected base: Average weekday audience (in 000s)	(12,959)	(13,999)	(16,284)	(9,356)

Source: SMRB, 1986 Study of Media & Markets

Table 28

Types of Daily Newspaper Pages or Sections Usually Read
(Female readers, by Census region)

	Northeast	North Central	South	West
Usually read every page	73%	65%	54%	57%
Read certain pages or sections	27	35	46	43
Business, finance	79	74	72	69
Classified	80	77	76	67
Comics	85	79	72	74
Editorial page	87	79	74	73
Entertainment	90	85	81	78
Food, cooking	90	82	80	73
General news	94	94	91	93
Home furnishings, gardening	88	80	73	69
Sports	83	73	66	66
TV, radio listings	87	79	73	72
Projected base: Average weekday audience (in 000s)	(14,154)	(14,098)	(17,432)	(9,472)

Source: SMRB, 1986 Study of Media & Markets

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Newspapers & Nondailies

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NEWSPAPERS AND NONDAILIES

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper business and its advertisers.

The study was directed and the report written by Nicolas A. Bloom and Albert E. Gollin of the Research Department with the collaboration of Tom Fitzpatrick of the Marketing Services Department at NAB.

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November 1986

INTRODUCTION

Daily and Sunday newspapers face a great variety of local print competitors in their market areas. These can include shoppers, pennysavers, free "neighborhood" papers, weekly TV listings, free automotive listings, apartment/real estate listings, buying guides or "traders," and paid weeklies. Some of the latter are actually made freely available in parts of their distribution zones. Given their hybrid forms and varied publishing frequencies, they can best be termed "nondailies."

The purpose of this study of nondailies and daily newspapers in four markets is to update and enlarge the scope of an earlier (1978) four-market study of the readership of paid weekly newspapers and free weeklies (shoppers, pennysavers, etc.), and to compare the perceived benefits of free weeklies with daily papers as sources of local shopping information and news.

Four markets were selected, according to the following criteria:

- one market from each Census region;
- one market each with 20,000-30,000, 40,000-60,000, 80,000-100,000, and 100,000+ daily circulation;
- substantial competition from free weekly paper(s); and
- publication of a TMC product.

Market I was a southern paper with a daily circulation of 90,000; Market II was a northeastern paper with a daily circulation just over 100,000; Market III was a western paper with a daily circulation of 30,000; and Market IV was a midwestern paper with a daily circulation of 40,000.

Interviews were conducted in each market with a random-digit-dial telephone sample of 200 adults (age 18+). Equal numbers of male and female respondents, randomly selected from among adults in the household, were interviewed each day. Interviewing was limited to each daily newspaper's home county, the county in which it is published. The field work was done by MORI Inc. of Minneapolis, MN from Tuesday, June 3 to Saturday, June 7, 1986. (Further details of the conduct of this study are contained in the Technical Appendix.)

A set of benchmarks or estimates of the seven-day reach of daily and Sunday newspapers and of free weeklies were obtained from the Roper Organization's June 1986 "Roper Reports" omnibus survey. Field work for this survey was conducted during the period in which the field work was done in the four local markets. The sample for the national survey consisted of 1,994 respondents who were interviewed face-to-face at home, Saturday, May 31 - Saturday, June 7, 1986.

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HIGHLIGHTS

Four markets were selected to study competition from nondailies, according to several criteria: varying market size and daily circulation, publication of a TMC product, and strong competition from free weeklies.

1. Across the four markets surveyed, past week's readership of the local daily newspaper was 80 percent and that of free weeklies was 57 percent. Across these markets, four-fifths (81%) of those who read a free weekly also read an edition of the local daily newspaper in the past week.

2. While 66 percent of all adults got home delivery of a free weekly, the corresponding four-market averages for both the local daily newspaper (59%) and the Sunday paper (60%) were slightly lower.

3. Across the four-market sample, the daily newspaper's readership consists disproportionately of upper-income ($35,000 and over), older (55 or older), college graduates, and long-term (10 or more years) residents of their areas. Adults who read free weeklies but not a daily newspaper (the non-overlapping audience) tended to be younger (18-34 years old) and to have more moderate incomes.

4. Two-fifths (44%) of all adults in the four markets have read or looked into a shopping guide ("trader") at some time. However, past week's readership is only 10 percent; an additional 12 percent saw one in the past month but longer ago than one week. People with household incomes of $35,000 and over are particularly likely to have read or looked into a "trader" in the past month.

5. Four-fifths (82%) of the readers of free shoppers or pennysavers in the four markets found something interesting or useful in them. The primary interest was their advertising (81%)—principally help-wanted ads (24%), grocery store ads (21%), and other types of advertising (17%). There were substantial market-to-market variations in the perceived usefulness of the advertising in free weeklies.

6. Daily newspapers' ratings (vs. those for free weeklies) are strongest for community news, news from outside the local community, and help-wanted ads. Their ratings are also quite strong for automobile ads, usefulness for food shopping (except in one market), and information on local stores and services. Daily newspapers' ratings as a source of shopping information for clothing items are significantly higher than they are for other products.

7. Daily newspapers face the strongest competition from free weeklies for advertising by "local neighborhood" stores and services as well as classified ads for housing and automobiles.

8. Results from a large national sample survey showed that 83 percent of American adults read at least one issue of a daily newspaper during a specified seven-day period. During that same period, 57 percent of the adults read a free weekly paper. Eight out of nine (88%) readers of a free weekly _also_ read at least one edition of a daily newspaper in the past week.

SECTION ONE. READERSHIP AND HOME DELIVERY OF LOCAL PRINT MEDIA

Yesterday Readership of a Daily Newspaper*

Three-fifths (60%) of adults across the four markets read a local daily newspaper yesterday (see Table 1.1). A total of one-ninth (11%) of adults across the four markets read some other daily newspaper yesterday. Among the papers cited were USA Today (4%), The Wall Street Journal (3%), and The New York Times (1%). (Five percent of respondents read another non-local daily newspaper yesterday.) As most of the yesterday readers of other daily papers also read the local daily newspaper, the net yesterday readership of any daily paper was 62 percent.

People who are older (55+), upper-income ($35,000+), have lived in the area for at least ten years, males, and college graduates were all more likely than their counterparts to have read a local daily newspaper yesterday. Variations in readership across the four markets surveyed were substantial, however, both overall (55%-68%) and among demographic groups in the four sampled counties.

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* The number of respondents in various demographic groups in each of the four markets is shown in Appendix Table A.1.

Table 1.1

YESTERDAY READERSHIP OF A LOCAL DAILY NEWSPAPER AMONG DEMOGRAPHIC GROUPS

		Market			
	Total	I	II	III	IV
Total	60%	57%	68%	59%	55%
By Sex:					
Male	64	57	76	63	59
Female	55	57	59	55	50
By Age:					
18-34	46	37	53	52	38
35-54	63	67	72	60	51
55 or older	77	72	83	74	76
By Income:					
Under $25,000	53	42	68	50	54
$25,000-$34,999	66	76	63	76	46
$35,000+	71	74	66	73	68
By People Contributing To Household Income:					
One	62	58	71	63	59
Two or more	57	56	65	57	50
By Education:					
Less than HS grad	65	52	70	63	68
High school grad	51	54	56	37	54
1-3 years of college	55	49	79	57	41
College grad or more	72	71	77	80	60
By Marital Status:					
Married	63	64	68	62	57
Divorced/widowed/separated	65	64	78	59	59
Never married	47	35	57	53	44
By Household Size:					
One	61	47	86	69	51
Two	66	62	77	62	64
Three or more	54	57	55	54	49
By Length Of Residence In Area:					
9 years or less	51	45	64	55	42
10+ years/entire life	64	64	69	63	61

Question: "When was the last time you read or looked at a morning/afternoon copy of the weekday (NAME OF LOCAL DAILY NEWSPAPER)?"

Frequent Readership of the Local Daily Newspaper

Almost three-fifths (58%) of all adults read four or all five Monday-through-Friday editions of their local daily newspaper (see Table 1.2).* People who were more likely to have read a local daily yesterday—males, college graduates, older (55+), upper-income ($35,000+) adults—are also more likely to have read it regularly in the preceding week.

Past Week Readership

Table 1.3 presents the past week's reach of the local print media in the four markets. Four-fifths (80%) of adults in these four markets read a local daily newspaper at least once in the past week. Past week's readership of dailies in the four markets ranged from 74 percent to 88 percent.

Three-fourths (76%) of adults in the four markets read last week's Sunday newspaper; the net daily or Sunday readership was 89%. Again, there were important market-to-market variations in both past week Sunday readership (71%-82%) and in net daily or Sunday readership (85%-96%).

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* Frequent reader = Read four or all five issues of a local daily paper in the preceding week. Question: "Other than yesterday, which you've already told me about, I'd like you to tell me whether you, yourself, have read or looked into a copy of the weekday (NAME OF LOCAL DAILY PAPER) within the past seven days. Let's start with a week ago today — that is, last (DAY OF INTERVIEW). Did you read a weekday copy of the (NAME OF LOCAL DAILY PAPER) on (DAY OF WEEK)?" (GO THROUGH EACH DAY OF THE WEEK EXCEPT YESTERDAY.)

Table 1.2

FREQUENT READERSHIP OF A LOCAL DAILY NEWSPAPER AMONG DEMOGRAPHIC GROUPS

		Market			
	Total	I	II	III	IV
Total	58%	56%	66%	55%	54%
By Sex:					
Male	62	56	74	61	57
Female	53	56	58	49	50
By Age:					
18-34	40	35	46	42	35
35-54	66	66	82	63	56
55 or older	73	72	77	72	71
By Income:					
Under $25,000	50	37	65	49	48
$25,000-$34,999	64	76	63	64	54
$35,000+	72	74	71	73	68
By People Contributing To Household Income:					
One	59	60	68	55	55
Two or more	56	54	64	54	52
By Education:					
Less than HS grad	61	48	70	50	68
High school grad	51	55	57	37	53
1-3 years of college	48	49	70	46	32
College grad or more	73	69	77	80	65
By Marital Status:					
Married	61	63	67	58	57
Divorced/widowed/ separated	64	64	72	63	56
Never married	44	35	57	43	41
By Household Size:					
One	57	44	82	62	49
Two	63	62	71	60	61
Three or more	53	55	57	49	50
By Length Of Residence In Area:					
9 years or less	48	45	60	49	37
10+ years/entire life	63	62	68	59	62

Table 1.3

PAST WEEK READERSHIP OF LOCAL PRINT MEDIA

		Market			
	Total	I	II	III	IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
Past Week Readership Of:					
Local daily newspaper	80%	77%	88%	81%	74%
Sunday newspaper	76	71	82	73	77
Read Paid Or Free Weekly					
Paid weekly	14	19	21	4	12
Free weekly	57	43	59	58	68
Both paid and free weeklies	9	8	18	2	8
Local Daily or Sunday Newspaper (Net)	89%	85%	96%	89%	87%

Questions: "Not counting today, have you read or looked at a local paid weekly newspaper since last (DAY OF INTERVIEW)? I mean a local newspaper printed once a week that you have to pay for?"

"Now, I would like to ask you about free weekly newspapers. This could be a newspaper, shopper or 'pennysaver' that is delivered free to your home or that you can just pick up free at stores, supermarkets, and so on. For the purpose of these question, we're not going to be asking about (NAME OF TMC PRODUCT), the free newspaper that was mentioned before. First of all, not counting today, have you read or looked at a free weekly paper since last (DAY OF INTERVIEW)?"

"Did you read or look into any part of this past Sunday's (NAME OF LOCAL SUNDAY PAPER)?"

The paid weekly readership figure across the four markets is significantly different from that for free weeklies (14% vs. 57%, respectively). This divergence is partly due to the selection criteria, which focused on papers in markets with strong competition from free weeklies. It may also reflect the competitive success achieved by the local TMC products published by the newspaper in each of the four markets.

The local reach of paid weeklies ranged from only 4 percent to 21 percent. The free weeklies' reach ranged from 43 percent (Market I) to 68 percent (Market IV).

Almost one-half (46%) of all adults across the four markets read at least one issue of the local daily newspaper and a free weekly in the past week (see Table 1.4). Three times as many adults read at least one issue of a daily newspaper but not a free weekly in the past week than read a free weekly but not a daily newspaper (34 % and 11%, respectively). The remaining 9 percent were not reached by either medium in the past week.

Duplicated readership between the local daily newspaper and a free weekly paper averaged 81 percent in the four markets, with all four having at least a 71 percent overlap in readership of these two media. The same conclusion holds, in varying degree, for all of these markets: advertising in nondailies adds little to the reach achieved by the local daily alone.

Table 1.4

DUPLICATED READERSHIP BETWEEN DAILY NEWSPAPERS AND FREE WEEKLIES

		Market			
	Total	I	II	III	IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
Read In Past Week:					
Daily and free weekly	46%	30%	52%	49%	52%
Daily but not free weekly	34	47	36	32	22
Free weekly but not daily	11	13	7	9	16
Neither	9	11	6	10	11
Duplicated readership between local daily paper and free weekly (46%/57%)	81%	71%	88%	84%	77%

Who Reads Dailies and Free Weekly Papers?

Consistent with previous research,* older (55+ years old), upper-income ($35,000 and over), college-educated, and more stable residents (10+ years living in the area) were all more likely than their counterparts to have read a daily and a Sunday newspaper in the past week (see Table 1.5 and also Appendix Table A.2).

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* See "Newspapers In American News Habits: A Comparative Assessment" (Newspaper Advertising Bureau, 1985) and "The Daily Diet Of News: Patterns Of Exposure To News In The Mass Media" (Newspaper Advertising Bureau, 1978).

Table 1.5

PAST WEEK READERSHIP OF LOCAL PRINT MEDIA AMONG DEMOGRAPHIC GROUPS

	Local Daily Paper	Sunday Paper	Free Weekly	Daily + Free Weekly	Paid Weekly	Uniquely Reached By: Local Daily	Uniquely Reached By: Free Weekly
Total	80%	76%	57%	46%	14%	34%	11%
By Sex:							
Male	81	78	56	47	13	34	9
Female	79	74	57	45	14	34	13
By Age:							
18-34	72	68	56	41	12	31	15
35-54	81	78	60	50	15	32	11
55 or older	90	82	54	49	14	41	5
By Income:							
Under $25,000	77	71	58	45	12	33	13
$25,000-$34,999	82	77	56	45	15	37	11
$35,000+	86	88	58	52	17	37	6
By People Contributing To Household Income:							
One	80	73	57	46	12	34	11
Two or more	80	77	57	46	15	34	11
By Education:							
Less than HS grad	79	74	59	45	20	33	13
High school grad	77	71	57	46	12	32	12
1-3 years of college	78	75	60	47	15	31	13
College grad or more	85	82	53	46	13	40	7
By Marital Status:							
Married	81	78	60	49	15	32	11
Divorced/widowed/ separated	83	74	55	46	9	37	9
Never married	74	71	50	37	15	36	13
By Household Size:							
One	76	56	57	44	14	32	14
Two	84	80	56	48	12	36	7
Three or more	78	75	57	44	15	34	13
By Length Of Residence In Area:							
9 years or less	72	68	58	41	11	31	17
10+ years/entire life	84	80	56	48	15	36	9

Competition From Free Weeklies

Readership levels of free weeklies varied across the four markets, as did the numbers of free weeklies that compete with the local daily newspapers in their home counties. In Markets III and IV, only one free weekly competes with the local daily: 53 percent and 65 percent of all adults, respectively, read these free weeklies specifically in the past week (see Table 1.6). (In Markets III and IV, a small proportion of adults read some other free weekly during the past week.) In Market I, a highly fragmented set of free weeklies competes with the local daily paper: none has a readership as high as 20 percent, and there are another six which were read by only 1 or 2 percent of the adults in the daily paper's home county. In Market II, there are four free weeklies, each of which was read by between 10 and 19 percent of the adults in that market's home county.

Table 1.6

STRUCTURE OF FREE WEEKLIES'
COMPETITION WITH DAILY NEWSPAPERS

	Market			
	I	II	III	IV
Base: Total Respondents	(200)	(200)	(200)	(200)
Read A Free Weekly	43%	59%	58%	68%
Free Weekly With:				
Highest readership	18%	19%	53%	65%
2nd highest readership	11	18		
3rd highest readership	7	14		
4th highest readership		10		

Home Delivery

This study also examined home delivery of daily and Sunday newspapers and free and paid weeklies. Table 1.7 presents the results in each of the four markets, for these four print media.

Three-fifths of households had a daily newspaper or a Sunday paper delivered to their homes (59% and 60%, respectively), somewhat lower than the 66 percent of households that got home delivery of a free weekly. As expected, the local daily newspapers in these markets confront substantial competition from free weeklies: in three markets home delivery of free weeklies actually exceeded those of the local daily. There were wide variations in households getting home delivery of a free weekly, ranging from 46 percent in Market I to 78 percent in Market IV.

The preponderance (78%) of yesterday readers of local daily newspapers had that copy delivered to their homes. This group constituted 46 percent of the adult population. An additional 13 percent of the respondents did not read a local daily yesterday but belonged to households which did get home delivery of that paper.

Home delivery of free weeklies exceeded their readership: although the four-market average for home delivery of free weeklies was 66 percent, only 57 percent of all adults read the issue of that free weekly. By way

Table 1.7

HOME DELIVERY OF LOCAL PAPERS

	Total	Market I	Market II	Market III	Market IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
Family Gets Home Delivery Of:					
Local daily newspaper	59%	61%	65%	59%	53%
Sunday newspaper	60	63	63	61	52
Paid weekly	15	19	19	7	15
Free weekly	66	46	69	72	78
Base: Read A Daily Newspaper yesterday	(476)	(114)	(135)	(118)	(109)
Copy of local daily read yesterday was home delivered	78%	81%	76%	81%	74%

Questions: "When was the last time you read or looked into a weekday copy of the weekday morning/afternoon (NAME OF LOCAL DAILY)?"
(IF READ YESTERDAY) "Was the copy of the morning/afternoon (NAME OF LOCAL DAILY) you read yesterday delivered to your home, bought outside your home, or did you get it some other way?"
(IF NOT READ YESTERDAY) "Do you or your family get home delivery of the weekday morning/afternoon (NAME OF LOCAL DAILY)?"

"What about Sunday editions? Do you or your family get home delivery of the (NAME OF LOCAL SUNDAY PAPER)?"

(IF NAMED A PAID WEEKLY READ IN PAST WEEK) "Are any of these paid weekly papers that you read delivered to your home or apartment because you or someone in your household subscribes?"
(IF DID NOT READ A PAID WEEKLY IN PAST WEEK) "Are any paid weekly papers delivered to your home or apartment because you or someone else in your apartment has a paid subscription?"

"Are any free weekly newspapers delivered to your home or apartment?"

of contrast, past week readership of daily newspapers (80%) was substantially higher than the four-market average for home delivery (59%).

People who were more likely to read each type of local paper—those who have lived in the area for at least ten years, college graduates, older (55+), and upper-income ($35,000+) adults—were generally more likely to get home delivery of them (see Table 1.8 and also Appendix Table A.3). Men were more likely than women to subscribe to the local daily and Sunday newspapers, but women were more likely than men to live in households that got home delivery of a free weekly.

Although upper-income ($35,000+) respondents were more likely than their counterparts to get home delivery of free weeklies, the former are no more likely than the latter to have read that free weekly. Therefore, the distribution pattern of free weeklies appears to be more attractive than is their actual readership, in demographic terms.

Table 1.8

HOME DELIVERY OF LOCAL PRINT MEDIA AMONG DEMOGRAPHIC GROUPS

	Local Daily Paper	Sunday Paper	Paid Weekly	Free Weekly
Total	59%	60%	15%	66%
By Sex:				
Male	62	62	14	63
Female	57	57	15	69
By Age:				
18-34	46	51	13	67
35-54	63	61	15	68
55 or older	75	70	17	61
By Income:				
Under $25,000	50	51	14	62
$25,000-$34,999	66	64	15	71
$35,000+	78	79	18	73
By People Contributing To Household Income:				
One	55	53	14	65
Two or more	63	64	15	67
By Education:				
Less than HS grad	52	50	20	58
High school grad	58	56	13	64
1-3 years of college	55	60	15	71
College grad or more	69	69	14	69
By Marital Status:				
Married	65	65	16	71
Divorced/widowed/separated	50	51	10	58
Never married	51	52	14	58
By Household Size:				
One	51	50	11	54
Two	64	64	15	71
Three or more	59	60	15	66
By Length Of Residence In Area:				
9 years or less	47	50	13	65
10+ years/entire life	66	65	15	66

Traders

In many areas of the country, publications containing advertising for only one type of product, e.g., cars, can be purchased. These buying guides or "traders" represent potentially significant competition to the daily newspaper's classified advertising, primarily because they often contain photos of the advertised product.

More than one-half (56%) of the adults in the local markets have seen one of these buying guides, and 44 percent have "looked into" them at one time or another (see Table 1.9). However, only 10 percent of adults looked into a buying guide in the past week; an additional 12 percent saw one in the past month, but longer ago than one week. Thus, the past month's reach of all "traders" combined is much lower than the past week's reach of local daily newspapers.

Again, there are substantial local variations in the availability of traders: in Market I, 64 percent of adults have seen a trader but in Market IV, only 41 percent have seen one. Past week's usage also varied significantly: from 7 percent in Market II to 13 percent in Market I.

Usage of buying guides or "traders" within the past month is made more often by males, those 18-54 years old, upper-income ($35,000+) adults, people within two-earner households, and those with at least some college education (see Table 1.10). Because awareness and readership of these buying guides are more common among the upper-income segments, they must be considered a potential threat to certain categories (e.g., home and automotive) of the daily newspaper's classified business.

Table 1.9

BUYING GUIDES/"TRADERS"

	Total	Market I	Market II	Market III	Market IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
Ever Saw Buying Guides/ "Traders"	56%	64%	57%	61%	41%
Ever Looked Into Buying Guides/"Traders"	44	54	46	46	30
In past week	10	13	7	10	12
In past month	12	17	11	15	6
More than a month ago	20	22	27	20	11
Don't know	2	3	2	1	2
Never Looked Into Buying Guides/"Traders"	12	10	11	15	11
Never Saw Buying Guides/ "Traders"	44%	36%	43%	39%	59%

Questions: "In some communities, buying guides or 'traders' — consisting mostly of advertising for only one kind of product, like automobiles or homes are available. Have you ever seen any publications like this in your community?"

(IF YES) "Have you ever read or looked into such a publication?" (IF YES) "When was the last time you looked into one?"

Table 1.10

PAST MONTH USE OF BUYING GUIDES/TRADERS AMONG DEMOGRAPHIC GROUPS

		Market			
	Total	I	II	III	IV
Total Respondents	22%	30%	18%	25%	18%
By Sex:					
Male	26	33	23	22	24
Female	20	26	13	28	11
By Age:					
18-34	24	34	26	23	15
35-54	25	30	15	35	21
55 or older	17	23	12	16	17
By Income:					
Under $25,000	21	20	24	24	17
$25,000-$34,999	20	24	16	24	14
$35,000+	33	44	16	40	26
By People Contributing To Household Income:					
One	20	25	14	24	16
Two or more	25	32	21	26	18
By Education:					
Less than HS grad	17	13	26	13	11
High school grad	21	23	22	25	14
1-3 years of college	26	44	12	23	23
College grad or more	24	34	7	32	21
By Marital Status:					
Married	23	29	18	26	20
Divorced/widowed/separated	19	25	22	22	10
Never married	24	33	16	24	18
By Household Size:					
One	18	24	7	31	13
Two	21	27	20	23	13
Three or more	25	34	19	22	23
By Length Of Residence In Area:					
9 years or less	23	27	20	25	18
10+ years/entire life	22	31	17	25	17

SECTION TWO. FREE WEEKLIES: USES AND GRATIFICATIONS

Respondents who had read a free weekly in the past week were asked if there was anything in that paper that they found useful or interesting. Four-fifths (82%) of free weeklies' readers did find some part of their content interesting or useful (see Table 2.1). There was a wide range of variation in these proportions: from 66 percent in Market I to 90 percent in Market IV.

Table 2.1

FOUND SOMETHING USEFUL OR INTERESTING
IN FREE WEEKLY READ

		Market			
	Total	I	II	III	IV
Base: Read A Free Weekly In Past Week	(454)	(85)	(117)	(116)	(136)
Yes, found something interesting or useful	82%	66%	79%	85%	90%
No	16	28	16	14	10
Don't know	2	6	4	1	-

Questions: "First of all, not counting today, have you read or looked at a free weekly paper since last (DAY OF INTERVIEW)?"
(IF YES) "Is there anything in that free weekly that you personally find useful or interesting?"

Those free weekly readers who claimed to find something worth reading or looking at were then asked to name those parts of the paper.

Four-fifths (81%) mentioned one or more types of advertising, and one-third (32%) volunteered some category of editorial content as having attracted their attention (see Table 2.2). Interest in free weeklies' advertising ranged from 54 percent to 91 percent, while interest in news or editorial features varied between 10 percent and 54 percent.

The most frequently mentioned advertising items were the help-wanted ads (24%), grocery store ads (21%), and advertising in general (17%). The most often volunteered categories of editorial content were the calendar of local events and the local news (9% each).

There were substantial variations among the four markets in responses to this question. In Market I, citations of certain items of advertising and editorial content were equal (54% each). The calendar of local events (30%) and the help-wanted ads (25%) were the two predominant items of interest in that market.

Readers of free weeklies in Market II showed a greater interest in advertising (74%) and a lesser interest in editorial content (49%). Citation of useful types of advertising in this market were more widely dispersed: they included help-wanted ads (26%), non-specific store ads (16%), grocery store ads (13%), sales/bargains (12%), and garage sales (10%). Editorial content items mentioned more often included local news (23%), calendar of local events (13%), and school news (12%).

Table 2.2

USES AND GRATIFICATIONS OF FREE WEEKLY READ

	Total	Market I	Market II	Market III	Market IV
Base: Past Week Readers Of A Free Weekly Who Found Something Useful/ Interesting	(371)	(56)	(93)	(99)	(123)
Advertising (Net)	81%	54%	74%	91%	90%
Help-wanted/job ads	24	25	26	32	15
Grocery store ads	21	-	13	8	46
Ads/the advertising (Non-specific)	17	7	5	22	25
Sales/bargains	12	11	12	16	11
Garage/yard/rummage sales	11	4	10	8	18
Store ads (Non-specific)	10	5	16	11	7
Coupons	6	2	5	5	8
Auto ads	5	4	-	11	6
News/Editorial Features(Net)	32%	54%	49%	10%	28%
Local events/calendar of events	9	30%	13	2	2
Local news	9	9	23	1	4
TV listings	6	-	-	2	16
School news	4	2	12	1	-
Recipes	2	5	5	-	1
Columnists	1	5	-	-	-
Other	5	11	2	4	5
Don't know/nothing specific	3	2	1	3	4

Note: Columns add to more than 100%: multiple answers were coded.

Questions: "First of all, not counting today, have you read or looked at a free weekly paper since Last (DAY OF INTERVIEW)?"

(IF YES) "Is there anything in that free weekly paper that you personally find useful or interesting?" (IF YES) "What is it that you find useful or interesting?"

The free weeklies in Markets III and IV were interesting or useful principally for their advertising. Nine-tenths of the readers of free weeklies in these two markets mentioned at least one type of advertising content in responding to this question. The main advertising items of interest in Market III were help-wanted ads (32%), advertising in general (22%), and sales/bargains (16%). The corresponding items in Market IV were grocery store ads (46%), advertising in general (25%), garage sales (18%), and help-wanted ads (15%).

Editorial items appealed to only 10 percent of readers of free weeklies in Market III, but to 28 percent in Market IV. The key editorial feature in the latter market were the TV listings (16%).

It is apparent from these detailed findings that free weeklies vary substantially in their general appeal to readers, as indicated by their level of readership and by whether certain items of advertising or editorial content are readily cited as interesting or useful. In certain markets the free weeklies appear to be more of a competitive threat, seen from the readers' perspectives, than in others—mainly in the realm of advertising, but (as in Market I and II) also in the area of local editorial content coverage.

SECTION THREE. ATTITUDES TOWARD DAILY NEWSPAPERS AND FREE WEEKLIES

Strengths and Weaknesses of Local Daily Newspapers

This section explores how daily newspapers and free weeklies were evaluated both as to their editorial and advertising content and as sources of shopping information for different types of products.

Adults in the four markets were most likely to say that their daily paper "tells you more of what is going on outside your community" (85% vs. 5%), "tells you what is going on in your community" (77% vs. 13%), and "has the best help-wanted and employment ads" (76% vs. 6%) compared with free weeklies (see Table 3.1). The preference for the daily newspaper was relatively less marked for "has the best automobile ads for car buyers" (54% vs. 22%), "is most useful for your food shopping" (55% vs. 29%), and "is the best place to look for information on local stores and services" (58% vs. 25%). But no comparison produced a majority of adults who chose free weekly papers over the local daily across the four markets.

Daily newspapers are rated a better source of shopping information than are free weeklies for clothing items (76% vs. 11%), reflecting two of their prime sources of advertising—department and retail clothing stores. More than three-fifths of the respondents also said daily newspapers were a better source of shopping information for four other items—a new TV set, living room furniture, carpeting, and small kitchen appliances.

Table 3.1

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND FREE WEEKLIES: FOUR-MARKET TOTALS

	Those Answering		
	Daily Newspaper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
Editorial And Advertising Content-Statement Is More True Of:			
Tells you more of what is going on outside your community	85%	5%	3%
Tells you what is going on in your community	77	13	4
Has the best help-wanted and employment ads	76	6	4
Has the best coverage of your local school board	69	15	4
Has the best cents-off coupons	66	16	5
Has the best classified ads for houses and apartments	65	17	4
Is the best place to look for information on local stores and services	58	25	8
Is most useful for your food shopping	55	29	6
Has the best automobile ads for car buyers	54	22	6
Better Source Of Shopping Information On:			
Clothing items	76%	11%	5%
A new TV set	64	16	9
Living room furniture	63	16	9
Small kitchen appliances	63	18	8
Carpeting	62	16	8

Questions: "Now I'm going to read some statements which might be used to describe your local daily newspaper and free weekly newspapers. Please tell me whether each state-is more true of the daily newspaper or of the free weekly newspapers. The first is . . .(READ EACH STATEMENT)"

"Suppose you were thinking of buying some clothing and wanted to look at some ads for styles, prices, brands, what's available locally, and so on. Please tell me which of the two—the daily newspaper or the free weekly paper—would be a better source of shopping information on clothing? What about . . .(CONTINUE WITH EACH ITEM.)"

There were often substantial differences among the four markets in the comparative advantage held by the local dailies (see Table 3.2 and Appendix Tables A.4-A.7). Perhaps the most striking contrast was found in response to this statement: "Is the most useful for your food shopping." Dailies in Markets I and III scored well above average on this item, but the daily in Market IV scored 35 percentage points below the four-market average. (The free weekly in this market has 50% of all food advertising inserts.)

The local daily in Market I received ratings higher than the four-market average for all three statements dealing with classified advertising--houses and apartments, cars, and help-wanted ads, as well as for food shopping, cents-off coupons, information on local stores, and as a source of shopping information for all five specific items. Its coverage of the local school board received ratings higher than the four-market average too.

In contrast, the local daily in Market II scored lower than the four-market average for its coverage of both community news and the local school board, and as an information source on local stores and services. Its greatest advertising strengths are in all three areas of classified ads and cents-off coupons.

Adults in Market III rated their daily newspaper very highly on its coverage of community news and of the local school board, as well as its usefulness for food shopping. They rated the daily much lower, relative to free weeklies, for its automobile ads and slightly less well as a source of

Table 3.2

RATINGS OF LOCAL DAILY NEWSPAPER VS. FREE WEEKLIES

		Market			
Base: Total Respondents	Total (800)	I (200)	II (200)	III (200)	IV (200)
Editorial and Advertising Content-% saying statement is "more true of the daily newspaper"					
Tells you more of what is going on outside your community	85%	84%	84%	88%	85%
Tells you more of what is going on in your community	77	76	61	85	85
Has the best help-wanted and employment ads	76	82	76	75	73
Has the best coverage of your local school board	69	77	44	82	72
Has the best cents-off coupons	66	75	73	68	47
Has the best classified ads for houses and apartments	65	72	69	64	56
Is the best place to look for information on local stores and services	58	71	54	58	48
Is the most useful for your food shopping	55	77	58	68	20
Has the best automobile ads for car buyers	54	66	63	42	45
Daily Newspaper is a "better source of shopping information" for:					
Clothing items	76%	80%	75%	74%	76%
A new TV set	64	73	63	61	61
Living room furniture	63	71	68	58	55
Small kitchen appliances	63	72	64	58	57
Carpeting	62	71	67	57	56

shopping information for living room furniture, carpeting, and small kitchen appliances.

Respondents in Market IV gave their daily newspaper very high ratings on its coverage of the local community, but only a minority felt it was more useful than the free weekly for food shopping (see Table A.7). This is the only instance in which a majority of respondents said the statement is more true of the free weekly newspaper. They also gave the daily lower than average ratings for its cents-off coupons, classified ads for houses and apartments, automobile ads, as a source of information on local stores and services, and as a source of shopping information for living room furniture, carpeting, and small kitchen appliances. Clearly, given the much higher-than-average readership of the free weekly in this market (see Table 1.5), this daily is not doing as well in the competitive struggle as it ought to be doing--based on the greater dominance shown by the local dailies in the other three markets.

Weekly Grocery Expenditures and Attitudes Toward Local Print Media

Readership of free weeklies varied only slightly among groups of adults with different levels of weekly spending on groceries (see Table 3.3). Overall, the proportion who read a free weekly was highest (59%) among adults spending $76 or more per week on groceries, but the differences among adults with lower average weekly grocery expenditures were not great.

Readership of the local daily paper also varied only slightly among those who spent different amounts on groceries, although some variations in this pattern exist within each of the four markets.

Table 3.3

READERSHIP OF LOCAL DAILY AND FREE WEEKLIES
BY WEEKLY GROCERY EXPENDITURE

		Market			
	Total	I	II	III	IV
Base: Total Respondents					
% Who Read A Free Weekly In Past Week					
Total	57%	43%	58%	58%	68%
Less than $50	55	42	54	53	69
$50-$75	57	43	60	60	68
$76+	59	44	60	62	68
MEDIAN ($) AMONG THOSE READING FREE WEEKLY	61	60	63	67	55
% Who Read The Local Daily In Past Week					
Total	80%	77%	88%	81%	74%
Less than $50	79	69	93	84	72
$50-$75	80	81	83	80	74
$76+	83	83	87	79	83
MEDIAN ($) AMONG THOSE READING LOCAL DAILY	61	62	61	64	57

Question: "Just as a rough guess, how much would you say your household spends per week on groceries? Less than $50, between $50 and $75, between $75 and $100, more than $100?"

The median amounts spent per week on groceries by readers of the local daily newspaper and of the free weeklies were almost identical in all four markets. Neither medium can claim to be read disproportionately by adults who spend heavily on groceries. In addition, adults with the highest and the lowest weekly grocery expenditures were about equally likely to perceive the grocery store ads in free weeklies to be useful.

The percentages of free weekly readers who found the grocery store ads useful or interesting also did not vary greatly according to weekly grocery expenditures; they ranged between 15 percent among those spending $50-$75 to 25 percent among those who spend less than $50 for their groceries (see Table 3.4). Again, there were wide variations among the four markets. None of the respondents in Market I felt that the free weekly they read contained useful grocery store ads. (These free weeklies had hardly any ads of this type.) However, in Market IV, almost one-half (46%) of all free weekly readers volunteered that the grocery store ads were of some use to them, and this was most frequent among those who spent over $75 per week on their groceries (57%).

Table 3.4

USE OF FREE WEEKLIES BY GROCERY EXPENDITURE

	Total	Market I	Market II	Market III	Market IV
Base: Read A Free Weekly And Found Something Useful Or Interesting					
Used Free Weekly For Grocery Store Ads					
Total	21%	-%	13%	8%	46%
Less than $50	25	-	14	13	46
$50-$75	15	-	9	8	37
$76+	22	-	16	6	57
MEDIAN ($) AMONG THOSE FINDING GROCERY STORE ADS INTERESTING/USEFUL	58	-	67	63	56

Conclusions

The readership of local daily newspapers consists disproportionately of upper-income, better-educated adults with strong ties to their community, the type of audience that is most attractive to many advertisers. Although free weeklies also have wide distribution and readership among these groups, the vast majority of their readers also read the local daily at least once a week. Ads in free weeklies are available to relatively few adults who cannot see them in the local daily.

Not surprisingly, free weeklies are seen as useful primarily for their advertising. Local daily newspapers received their strongest ratings (vs. free weeklies) for all categories of their editorial content and advertising, particularly for classified ads and shopping information for clothing. The free weeklies show competitive appeal for their automotive ads, for their usefulness for food shopping, and for their use as a source of information on local stores and services.

The overall picture is one in which the local dailies outpace the non-dailies in their reach and competitive benefits. But, given the variations across markets in the measures used in this study, it is clear that areas of vulnerability can coexist within this generally strong competitive position. Individual daily newspapers need to evaluate the perceptions of adults in their own communities periodically in formulating marketing plans to meet the competition of free and paid weeklies.

SECTION FOUR. THE NATIONAL REACH OF DAILIES AND NONDAILIES

Nationally, according to the June 1986 Roper Reports omnibus survey, 83 percent of adults read at least one issue of a daily newspaper in the past week (see Table 4.1). This proportion is much greater than the proportion who read a free weekly (57%).* There is, however, a substantial overlap in the readership of daily newspapers and of free weeklies (see Table 4.2). One-half (50%) of all adults read one or more editions of a daily newspaper _and_ a free weekly in the past week. One-third (33%) of American adults read at least one issue of a daily newspaper but not a free weekly; by way of contrast, only 7 percent read a free weekly but no issues of a daily paper during the past week. Looked at another way, the readership duplication between dailies and free weeklies is very high. Only 12 percent of readers of a free weekly did not _also_ read a daily newspaper in the past week.

Three-fourths (72%) of American adults read or looked into some part of a Sunday newspaper in the past week (see Table 4.3). The past week net reach of daily _and_ Sunday newspapers amounts to 87 percent of American adults—the 83 percent who read a daily plus the 4 percent who read only a

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* The 57 percent net reach of free weeklies in the Roper study can have included the TMC editions increasingly being published by local daily papers as well as shoppers, pennysavers, or other local nondailies. Some of these are published on a bi-weekly (or more frequent) basis, thus increasing their net reach potential. As shown above, the four-market reach of free weeklies (specifically excluding TMC products) ranged between 43%-68% (see p. 5).

Table 4.1

PAST WEEK REACH: DAILY NEWSPAPERS AND FREE WEEKLIES

Base: Total Respondents	Total (1994)
Daily newspaper	83%
Free weekly	57

Questions: "I'd like you to tell me whether you, yourself, have read or looked at any daily newspapers within the past seven days—that is, since last (DAY OF INTERVIEW: IF SUNDAY INTERVIEW, SAY 'since a week ago Saturday')"

"How about papers that are available or delivered to you free of charge, such as free weeklies, shoppers, or penny-savers. Have you, yourself, read or looked at any of these free papers in the past 7 days?" (INTERVIEWER: DO NOT ACCEPT CIRCULARS OR FLYERS WITH ADS FOR ONLY ONE STORE AS A FREE WEEKLY.)

Table 4.2

DUPLICATED READERSHIP BETWEEN DAILY NEWSPAPERS AND FREE WEEKLIES

Base: Total Respondents	Total (1994)
Read A Daily Newspaper In Past Week	83%
And read a free weekly	50
And did not read a free weekly	33
Did Not Read A Daily In Past Week	17
And read a free weekly	7
And did not read a free weekly	10
Readership duplication between free weeklies and dailies (50%/57%)	88%

Sunday paper in the past week. The remaining 13 percent of adults did not read either a daily or a Sunday paper in the past week.

Thus, on the national level, the past week reach of daily newspapers and Sunday newspapers, alone or in combination, greatly exceeds the reach of free weeklies: seven out of eight American adults looked at one or more copies of a newspaper.

Table 4.3

PAST WEEK REACH OF DAILY OR SUNDAY NEWSPAPER

Base: Total Respondents	Total (1994)
Read A Daily Newspaper In Past Week	83%
And read a Sunday newspaper	68
Read a daily newspaper only	15
Did Not Read A Daily Newspaper In Past Week	17
And read a Sunday newspaper	4
Did not read a Sunday newspaper	13
Read a Sunday newspaper in past week (net)	72%
Past week reach of daily or Sunday newspaper (net)	87%

Question: "And did you read or look into any part of a Sunday paper in the past seven days? (IF SUNDAY INTERVIEW ADD 'including today')"

Past week readership of daily and Sunday newspapers is significantly higher among all demographic groups than is the readership of free weeklies, particularly among the higher-income groups that are of special interest to many advertisers (see Table 4.4).

Table 4.4

PAST WEEK READERSHIP AMONG DEMOGRAPHIC GROUPS

		Past Week Readership Of:		
	(Base:)	Daily News-paper	Sunday News-paper	Free Weekly
Total	(1994)	83%	72%	57%
By Sex:				
Male	(941)	84	72	54
Female	(1052)	82	73	60
By Age:				
18-29	(590)	79	69	52
30-44	(552)	84	74	59
45-59	(405)	87	78	60
60+	(446)	81	71	59
By Income:				
Under $15,000	(578)	74	59	51
$15,000-$24,999	(499)	82	71	60
$25,000-$34,999	(399)	85	79	62
$35,000 and over	(478)	92	85	58
By Education:				
Less than HS grad	(429)	69	54	51
High school grad	(736)	83	73	58
Some college +	(814)	89	82	60
By Region:				
Northeast	(438)	90	79	57
Midwest	(498)	84	72	66
South	(658)	78	69	50
West	(399)	81	71	58

Table 4.5 presents readership data by population size. It shows that past week readership of the daily newspaper is higher than average in smaller and middle-sized cities: in non-metropolitan cities (87%); in suburbs of central cities with 250,000-1 million population (86%); and in central cities with 50,000-250,000 population (86%) and their suburbs (84%).

Past week reach of free weekly papers was highest in the suburbs of central cities with at least one million population (73%) and lowest in their neigboring big cities (44%).

Duplicated readership of daily newspapers and free weeklies is consistently in the high eighties to low nineties, except in the suburbs of the largest central cities (85%), and non-metro towns and open country (84%). This finding demonstrates that the overlap among readers of daily newspapers and of free weeklies is quite high in almost all urbanized areas. As a result, ads placed in a free weekly reach only a relatively few readers who haven't also read the daily newspaper during that week.

Table 4.5

PAST WEEK READERSHIP BY POPULATION SIZE

	Past Week Readership Of:		Duplicated Readership:
Base: Total Respondents	Daily paper	Free Weekly	Daily And Free Weekly
Total	**83%**	**57%**	**88%**
Central cities 1 million and over	79	44	89
Suburbs of central cities 1 million and over	81	73	85
Central cities 250,000-1 million	81	57	87
Suburbs of central cities 250,000-1 million	86	59	89
Central cities 50,000-250,000	86	52	91
Suburbs of central cities 50M-250M	84	51	89
Non-metro cities 10,000-49,999	87	60	95
Non-metro towns under 10M and open country	78	64	84

APPENDIX TABLES

Table A.1

RESPONDENT BASES

		Market			
Total Respondents	Total (800)	I (200)	II (200)	III (200)	IV (200)
By Sex:					
Male	400	100	100	99	101
Female	400	100	100	101	99
By Age:					
18-24	118	28	30	39	21
25-29	99	27	20	32	20
30-34	106	19	28	29	30
35-44	163	46	40	37	40
45-54	90	27	20	20	23
55-64	101	31	24	23	23
65 or older	121	22	36	20	43
By Income:					
Under $10,000	99	18	13	37	31
$10,000-$14,999	104	19	23	33	29
$15,000-$24,999	181	37	42	49	53
$25,000-$34,999	128	29	38	33	28
$35,000 and over	174	66	44	30	34
Refused	114	31	40	18	25
By People Contributing To Household Income:					
One	334	79	78	80	97
Two	399	102	102	106	89
Three or more	65	19	18	14	14
By Employment:					
Working full-time	438	115	112	91	120
Working part-time	79	24	20	18	17
Unemployed	14	5	1	7	1
Retired	116	24	35	25	32
Student	43	7	3	28	5
Homemaker	104	23	28	30	23

(Continued)

Table A.1

RESPONDENT BASES
(Continued)

		Market			
Total Respondents	Total (800)	I (200)	II (200)	III (200)	IV (200)
By Education:					
Less than HS grad	121	23	46	24	28
High school grad	290	78	77	59	76
1-3 years of college	176	43	33	56	44
College grad	142	41	23	44	34
Postgraduate study	64	11	20	15	18
By Marital Status:					
Married	478	123	125	110	120
Divorced/widowed/ separated	137	28	36	32	41
Never married	182	48	37	58	39
By Household Size:					
One	133	34	28	26	45
Two	283	74	66	74	69
Three	160	38	41	48	33
Four	132	33	39	33	27
Five or more	89	21	23	19	26
By Length Of Residence In Area:					
2 years or less	104	26	16	34	28
3-5 years	103	24	25	34	20
6-9 years	83	25	14	25	19
10+ years/entire life	510	125	145	107	133
By Weekly Grocery Expenditure:					
Less than $50	275	71	61	57	86
$50-$75	273	72	78	70	53
$76-$100	149	33	35	39	42
$100+	74	19	17	27	11

Table A.2

PROFILES OF LOCAL PRINT MEDIA READERSHIP: FOUR MARKET TOTALS

	Local Daily Newspaper			
	Yesterday	Past Week	Sunday Paper	Free Weekly
Total Respondents	60%	80%	76%	57%
By Sex:				
Male	54	51	51	50
Female	46	49	49	50
By Age:				
18-34	31	37	36	40
35-54	33	32	33	34
55 or older	36	31	30	26
By Income:				
Under $25,000	50	53	52	56
$25,000-$34,999	20	19	19	18
$35,000+	30	28	29	26
By People Contributing To Household Income:				
One	44	42	40	42
Two or more	56	58	59	58
By Education:				
Less than HS grad	16	15	15	16
High school grad	31	35	34	37
1-3 years of college	20	21	22	23
College grad or more	31	28	28	24
By Marital Status:				
Married	63	61	62	63
Divorced/widowed/separated	19	18	17	17
Never married	18	21	21	20
By Household Size:				
One	17	16	15	17
Two	39	37	37	35
Three or more	43	46	47	48
By Length Of Residence In Area:				
9 years or less	31	33	32	37
10+ years/entire life	69	67	68	63

Table A.3

PROFILES OF HOME DELIVERY OF LOCAL PRINT MEDIA: FOUR MARKETS

	Local Daily Paper	Sunday Paper	Free Weekly
Total Respondents	59%	60%	66%
By Sex:			
Male	52	52	48
Female	48	48	52
By Age:			
18-34	31	34	41
35-54	34	33	33
55 or older	35	33	26
By Income:			
Under $25,000	47	47	52
$25,000-$34,999	20	20	20
$35,000+	33	33	28
By People Contributing To Household Income:			
One	41	40	43
Two or more	59	60	57
By Education:			
Less than HS grad	13	13	13
High school grad	36	34	36
1-3 years of college	20	22	24
College grad or more	30	30	27
By Marital Status:			
Married	66	65	65
Divorced/widowed/separated	15	15	15
Never married	20	20	20
By Household Size:			
One	14	14	14
Two	38	38	38
Three or more	47	48	48
By Length Of Residence In Area:			
9 years or less	29	31	36
10+ years/entire life	71	69	64

Table A.4

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND FREE WEEKLIES: MARKET I

	Those Answering		
	Daily Newspaper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
Editorial And Advertising Content-Statement Is More True Of:			
Tells you what is going on in your community	76%	16%	3%
Has the best classified ads for houses and apartments	72	14	4
Is most useful for your food shopping	77	12	5
Has the best automobile ads for car buyers	66	16	4
Tells you more of what is going on outside your community	84	8	3
Has the best help-wanted and employment ads	82	5	2
Has the best coverage of your local school board	77	9	2
Has the best cents-off coupons	75	11	6
Is the best place to look for information on local stores and services	71	17	6
Better Source Of Shopping Information On:			
Clothing items	80%	11%	4%
A new TV set	73	14	6
Living room furniture	71	15	6
Carpeting	71	15	6
Small kitchen appliances	72	15	7

Table A.5

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND FREE WEEKLIES: MARKET II

	Those Answering		
	Daily Newspaper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
Editorial And Advertising Content-Statement Is More True Of:			
Tells you what is going on in your community	61%	28%	7%
Has the best classified ads for houses and apartments	69	16	3
Is most useful for your food shopping	58	28	5
Has the best automobile ads for car buyers	63	13	5
Tells you more of what is going on outside your community	84	8	3
Has the best help-wanted and employment ads	76	8	4
Has the best coverage of your local school board	44	39	6
Has the best cents-off coupons	73	12	4
Is the best place to look for information on local stores and services	54	32	6
Better Source Of Shopping Information On:			
Clothing items	75%	12%	5%
A new TV set	63	15	10
Living room furniture	68	12	8
Carpeting	67	13	7
Small kitchen appliances	64	13	10

Table A.6

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND FREE WEEKLIES: MARKET III

	Those Answering		
Base: Total Respondents	Daily News-paper	Free Weekly	Neither/ Both Equal
Editorial And Advertising Content-Statement Is More True Of:			
Tells you what is going on in your community	85%	4%	4%
Has the best classified ads for houses and apartments	64	18	5
Is most useful for your food shopping	68	13	10
Has the best automobile ads for car buyers	42	34	8
Tells you more of what is going on outside your community	88	2	3
Has the best help-wanted and employment ads	75	6	6
Has the best coverage of your local school board	82	3	4
Has the best cents-off coupons	68	14	6
Is the best place to look for information on local stores and services	58	19	10
Better Source Of Shopping Information On:			
Clothing items	74%	10%	8%
A new TV set	61	14	13
Living room furniture	58	17	14
Carpeting	57	15	12
Small kitchen appliances	58	20	11

Table A.7

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND FREE WEEKLIES: MARKET IV

	Those Answering		
Base: Total Respondents	Daily Newspaper	Free Weekly	Neither/ Both Equal
Editorial And Advertising Content-Statement Is More True Of:			
Tells you what is going on in your community	85%	6%	4%
Has the best classified ads for houses and apartments	56	20	4
Is most useful for your food shopping	20	64	7
Has the best automobile ads for car buyers	45	26	8
Tells you more of what is going on outside your community	85	5	3
Has the best help-wanted and employment ads	73	5	4
Has the best coverage of your local school board	72	10	4
Has the best cents-off coupons	47	29	7
Is the best place to look for information on local stores and services	48	31	10
Better Source Of Shopping Information On:			
Clothing items	76%	12%	5%
A new TV set	61	20	9
Living room furniture	55	21	9
Carpeting	56	21	8
Small kitchen appliances	57	25	5

TECHNICAL APPENDIX

TECHNICAL APPENDIX

This technical appendix was written by MORI Inc.

A total of 800 interviews was completed by telephone from two central, monitored WATS facilities using trained interviewers. The questionnaire used required an average of 12 minutes for each completed interview. A copy of the questionnaire is appended to this report.

A pretest was conducted May 29, 1986 and actual interviewing took place during the period June 3-7. Interviewing was conducted Tuesday through Saturday, with equal quotas for males and females by day and by market to enable measurement of "yesterday" readership of the daily newspapers in each market.

Phone numbers were selected from a computer-generated, random-digit dialing list provided by Survey Sampling, Inc. One predesignated respondent was chosen from each household on the basis of sex and relative age. Respondents were screened for residence in the selected county. Up to four attempts were made to reach the designated respondent before a substitute phone number was used. Because of the limited time frame for interviewing, many of the numbers that were dialed late in the week were not called back. Two hundred interviews each were conducted in the home counties of the four daily newspapers.

Distribution of phone contacts was as follows:

Total phone numbers dialed	2,940
- Disconnected numbers	664
- Not eligible (wrong county)	117
- Business phone	133
VALID NUMBERS	2,026
Deaf/language problems	36
No answer/refused/terminated	573
Completed interviews	800

The pattern of completions was as follows:

Completed on the FIRST call	56%
Completed on the SECOND call	25
Completed on the THIRD call	12
Completed on the FOURTH call	7
TOTAL	100%

A sample of 10% of each interviewer's work was monitored or validated. No irregularities were revealed in validation.

Completed questionnaires were edited, and open-ended responses were coded using a sample of about 50 interviews from each market to develop coding categories. Data were keypunched into two independent files to permit verification. They were then cleaned and processed by crosstabulation.

FOUR-MARKET STUDY QUESTIONNAIRE

TIME STARTED: ____________ RESP. NO. __ __ __ __ (1-4)

TIME FINISHED: ____________ CARD NO. 1 (5)

DAY OF INTERVIEW: TUESDAY....1 MARKET: (6-7)
WEDNESDAY..2
THURSDAY...3
FRIDAY.....4
SATURDAY...5

Hello. I'm ____________ of MORI Research, an independent marketing research company. We're conducting a survey of how people in your area get their news and shopping information.

Just to be sure I have it right, is this [READ PHONE NUMBER]?

[WRITE IN] (__ __ __) __ __ __ - __ __ __ __ (8-17)

And to make sure that I'm calling in the right area, would you please tell me what county you live in?

[WRITE IN] ____________________

[CHECK AGAINST LIST OF ELIGIBLE COUNTIES. TERMINATE IF NOT ON LIST.]

For the purposes of this survey I need to speak with the [SEE BOX CHECKED BELOW] who lives in your household and is age 18 or older.

DESIGNATED RESPONDENT		SUBSTITUTE
[] YOUNGEST MAN	——→	[] YOUNGEST WOMAN
[] OLDEST MAN	——→	[] OLDEST WOMAN
[] YOUNGEST WOMAN	——→	[] YOUNGEST MAN
[] YOUNGEST MAN	——→	[] YOUNGEST WOMAN
[] OLDEST MAN	——→	[] OLDEST WOMAN
[] YOUNGEST WOMAN	——→	[] YOUNGEST MAN
[] OLDEST WOMAN	——→	[] OLDEST MAN

IF THE SELECTED RESPONDENT IS NOT AT HOME, ASK WHEN IT WOULD BE CONVENIENT TO CALL THAT PERSON BACK. IF THERE IS NO SUCH PERSON IN THE HOUSEHOLD, SUBSTITUTE THE OPPOSITE SEX.

IF THE PERSON SELECTED DECLINES TO BE INTERVIEWED, REMIND HIM/HER THAT IT IS VERY IMPORTANT THAT PEOPLE WITH OPINIONS LIKE HIS/HERS ARE REPRESENTED IN THE SURVEY. IF NECESSARY, ASK IF YOU CAN MAKE AN APPOINTMENT TO CALL BACK LATER. IF YOU DO THAT, GET THE RESPONDENT'S FIRST NAME, SO YOU'LL KNOW WHOM TO ASK FOR.

[WHEN THE DESIGNATED RESPONDENT IS ON THE LINE, SAY:]

Hello. This is ____________ calling for MORI Research, an independent marketing research company. We're conducting a survey of how people in your area get their news and shopping information. You are the person I need to talk to in this household so that our survey will be accurate.

[GO TO FIRST QUESTION]

CALL #1: ____________________

CALL #2: ____________________

CALL #3: ____________________

CALL #4: ____________________

INTERVIEWER: ____________

1. In your personal opinion, what would you say was the most interesting item item in the news yesterday or today? [IF CAN'T RECALL, SKIP TO Q.3.]

(18-19)

____

____

____

[IF THE RESPONDENT MENTIONS SOMETHING IN Q.1, ASK:]

2. Where did you learn about that news? [PROBE: "Any others?" ACCEPT MORE THAN ONE RESPONSE; CIRCLE ALL MENTIONED.]

(20-27)

Television....................
Newspaper.....................
Radio.........................
"Word of mouth"...............
OTHER [WRITE IN:]
____
Don't know....................

Now, I would like to ask you about daily newspapers, the ones that come out every weekday, Monday through Friday. It is very important for us to know when the different papers are read.

[ASK EVERYONE:]

3. When was the last time you read or looked into a weekday copy of the

(28)

Today......................................1
[ASK: And when was the last time before today?]

(29)

Yesterday.............................1 ⟶ ASK Q.4
Before yesterday......................2 ⟶ SKIP TO Q.5
Never.................................3 ⟶ SKIP TO Q.5

[IF READ YESTERDAY IN Q.3, ASK:]

4. Was the copy of the you read yesterday delivered to your home, bought outside your home, or did you get it some other way?

(30)

Delivered..................................1
Bought outside the home....................2
Some other way.............................3
Don't know/no answer.......................4
⟶ ALL SKIP TO Q.6

[IF IS NOT READ "YESTERDAY," ASK:]

5. Do you or your family get home delivery of the

(31)

Yes..............1
No...............2

[IF NOT HOME DELIVERY IN Q.4 OR Q.5, CHECK BOX AT Q.13 ON PAGE 3.]

[IF "NEVER READ" IN Q.3, SKIP TO Q.7.]

6. Other than yesterday, which you've already told me about, I'd like you to tell me whether you, yourself, have read or looked into a weekday copy of the within the past seven days. Let's start with a week ago today — that is, last [DAY OF INTERVIEW]. Did you read a weekday copy of the on ______________? [GO THROUGH EACH DAY OF THE WEEK EXCEPT YESTERDAY.]

(32-37)

	YES	NO	DK
Monday	1	2	3
Tuesday	1	2	3
Wednesday	1	2	3
Thursday	1	2	3
Friday	1	2	3
Saturday	1	2	3

7. Do you or your family get home delivery of any other daily newspapers?

Yes..............1 (48)
No..............2

[ASK EVERYONE:]

8. Were there any other daily newspapers you read or looked into yesterday?

Yes..............1 ⟶ ASK Q.9 (49)
No..............2 ⟶ SKIP TO Q.10

9. Which other daily newspaper(s) did you read or look into yesterday?

(50-53)
Wall St. Journal......01
USA Today..............02
New York Times........03
OTHER [WRITE IN:]________________

10. What about Sunday editions? Do you or your family get home delivery of the Sunday

Yes..............1 (54)
No..............2

[ASK EVERYONE:]

11. Did you read or look into any part of this past Sunday's

Yes..............1 (55)
No..............2

12. On how many of the last four weekends, if any, did you read or look into a Sunday edition of the

None............0 (56)
One.............1
Two.............2
Three...........3
Four............4
Don't know......5

[READ THIS INTRODUCTION TO EVERYONE:]

The publishes a special once-a-week version of the paper that they call the

[IF RESPONDENT OR FAMILY DOES NOT SUBSCRIBE TO THE IN Q.4 OR Q.5, ASK Q.13. SUBSCRIBERS SKIP TO Q.15.]

[ ] 13. Have you ever read a copy of that paper?

Yes..............1 (57)
No..............2 —— SKIP TO Q.15
Don't know......3 —— SKIP TO Q.15

[ASK IF "YES" IN Q.13:]

14. When was the last time you read a copy of the

Past week.......1 (58)
Past month......2
Longer ago than past month...3
Don't know......4

[ASK EVERYONE:]

15. Whether or not you read it regularly, is a copy of the delivered to your home or apartment?

Yes.............1 (59)
No..............2
Don't know......3

16. Not counting today, have you read or looked at a local paid weekly newspaper since last [DAY OF INTERVIEW]? I mean a local newspaper printed once a week that you have to pay for.

Yes.............1 (60)
No..............2 ⟶ SKIP TO Q.19
Don't know......3 ⟶ SKIP TO Q.19

[ASK IF "YES" IN Q.16:]

17. Can you recall the name of that newspaper(s)? [WRITE IN NAMES OF PAPERS.]

a. ______________________________ (61-64)

b. ______________________________

[ASK IF ANY PAPER(S) ARE NAMED IN Q.17:]

18. Are any of these paid weekly papers that you read delivered to your home or apartment because you or someone in your household subscribes?

Yes.............1 ⟶ ALL ANSWERS SKIP TO Q.20 (65)
No..............2
Don't know......3

[ASK IF "NO/DON'T KNOW" IN Q.16:]

19. Are any paid weekly papers delivered to your home or apartment because you or someone else in your household has a paid subscription?

Yes.............1 (66)
No..............2
Don't know......3

[ASK EVERYONE:]

20. Now, I would like to ask you about free weekly newspapers. This could be a newspaper, shopper or "pennysaver" that is delivered free to your home or that you can just pick up free at stores, supermarkets, and so on. For the purpose of these questions, we're not going to be asking about the free newspaper that was mentioned before.

First of all, not counting today, have you read or looked at a free weekly paper since last [DAY OF INTERVIEW]?

Yes.............1 (67)
No..............2 ⟶ SKIP TO Q.24
Don't know......3 ⟶ SKIP TO Q.24

[ASK IF "YES" IN Q.20:]

21. Which free papers have you read since last [DAY OF INTERVIEW]?

(68-73)

22. Is there anything in that free weekly that you personally find useful or interesting?

(74)
Yes..............1
No...............2 ⟶ SKIP TO Q.24
Don't know......3 ⟶ SKIP TO Q.24

[ASK IF "YES" IN Q.22:]

23. What is it that you find useful or interesting? [PROBE: Anything else?]

(75-80)
____
____
____

RESP. NO. (1-4)
CARD NO. 2 (5)

[ASK EVERYONE:]

24. Are any free weekly newspapers delivered to your home or apartment?

(6)
Yes..............1
No...............2
Don't know......3

25. In some communities, buying guides or "traders" — consisting mostly of advertising for only one kind of product, like automobiles or homes are available. Have you ever seen any publications like this in your community?

(7)
Yes..............1
No...............2 ⟶ SKIP TO Q.28
Don't know......3 ⟶ SKIP TO Q.28

26. Have you ever read or looked into such a publication?

(8)
Yes..............1
No...............2 ⟶ SKIP TO Q.28
Don't know......3 ⟶ SKIP TO Q.28

27. When was the last time you looked into one?

(9)
Past week.................1
Past month................2
Longer than past month...3
Don't know................4

[ASK EVERYONE:]

28. Now I'm going to read some statements which might be used to describe your local daily newspaper and free weekly newspapers. Please tell me whether each statement is more true of the daily newspaper or of the free weekly newspapers. The first one is...[READ EACH STATEMENT]

	DAILY	FREE WEEKLY	NEITHER/ BOTH EQUAL	DON'T KNOW	
a. Tells you what is going on in your community	1	2	3	4	(10)
b. Has the best classified ads for houses and apartments	1	2	3	4	(11)
c. Is most useful for your food shopping	1	2	3	4	(12)
d. Has the best automobile ads for car buyers	1	2	3	4	(13)

[CONTINUES...]

	DAILY	FREE WEEKLY	NEITHER/ BOTH EQUAL	DON'T KNOW	
e. Tells you more of what is going on outside your community	1	2	3	4	(14)
f. Has the best help-wanted and employment ads	1	2	3	4	(15)
g. Has the best coverage of your local school board	1	2	3	4	(16)
h. Has the best cents-off food coupons	1	2	3	4	(17)
i. Is the best place to look for information on local stores and services	1	2	3	4	(18)

29. Suppose you were thinking of buying some clothing and wanted to look at some ads for styles, prices, brands, what's available locally, and so on. Please tell me which of the two--the daily newspaper or the free weekly paper--would be a better source of shopping information on clothing? [RECORD BELOW.] What about...[CONTINUE WITH EACH ITEM.]

	DAILY	FREE WEEKLY	NONE/BOTH EQUALLY	DON'T KNOW	
a. Clothing items	1	2	3	4	(19)
b. A new TV set	1	2	3	4	(20)
c. Living room furniture	1	2	3	4	(21)
d. Carpeting	1	2	3	4	(22)
e. Small kitchen appliances	1	2	3	4	(23)

Finally, I'd like to ask you a few questions just for classification purposes. First...

30. How long have you been living in this area? (24)

Less than 1 year.........1
1-2 years................2
3-5 years................3
6-9 years................4
10 + years/all my life...5
REFUSED..................6

31. What was the last grade of school or year of college you completed? (25)

Less than high school grad...1
High school graduate.........2
1-3 years of college.........3
College graduate.............4
Postgraduate study...........5
REFUSED......................6

32. Just as a rough guess, how much would you say your household spends per week on groceries? [READ LIST:] (26)

Less than $50................1
Between $50 and $75..........2
Between $76 and $100.........3
More than $100...............4
[DO NOT READ:] DON'T KNOW/REFUSED...........5

33. In which of the following age groups does your age fall? [READ LIST:]

(27)

	18-24	1
	25-29	2
	30-34	3
	35-44	4
	45-54	5
	55-64	6
	65 years or older	7
[DO NOT READ:]	REFUSED	8

34. Are you currently married, divorced, widowed or separated, or have you never been married?

(28)

Married	1
Divorced	2
Widowed	3
Separated	4
Never married/single	5
REFUSED	6

35. Last week, were you working full time, part-time, going to school, keeping house, or what?

(29)

Working full-time	1
Working part-time	2
Unemployed, laid off, looking for work	3
Retired	4
In school/student	5
Keeping house/homemaker	6
Other [SPECIFY:] ________________	7
REFUSED	8

36. Including yourself and any children or babies, how many people are living in your home?

(30)

[WRITE IN NUMBER:] ________

37. Including yourself, how many people contribute to the household income — from their earnings or any other source?

(31)

[WRITE IN NUMBER:] ________

38. Which of these categories best describes your total household income before taxes, for 1985? [READ CATEGORIES:]

(32)

	Under $10,000	1
	$10,000 - $14,999	2
	$15,000 - $24,999	3
	$25,000 - $34,999	4
	$35,000 or more	5
[DO NOT READ:]	REFUSED	6

(33)

39. RECORD SEX:	Male	1
	Female	2

THANK THE RESPONDENT AND RECORD NAME, ADDRESS, CITY AND STATE. IF THE RESPONDENT WILL NOT GIVE ADDRESS, ASK SPECIFICALLY FOR THE ZIP CODE.

RESPONDENT NAME: ________________________

ADDRESS: ________________________

CITY: ________________________

STATE: ________________________ ZIPCODE: ____________

A8600-8.35U 4/87

KEY FACTS 1987:

Newspapers, Consumers, Advertising

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

KEY FACTS 1987:

NEWSPAPERS, CONSUMERS, ADVERTISING

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

April 1987

Newspaper Advertising Bureau, Inc.

How To Use Key Facts

The main purpose of this report compiled from many sources is to answer some of the most frequently asked questions about newspapers, consumers, and advertising.

The report is designed as a reference source, not as an account to be read through page by page. To maximize its reference value, the table of contents organizes specific items of information under general headings such as "Advertising Costs" and "Newspaper Circulation".

For example, information on daily newspaper reach and frequency comes under the general heading of "Newspaper Readership", where it is listed as "Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration".

The scope of the material is necessarily limited. For answers to other questions about newspapers and advertising, consult the heading "NAB Telephone Directory".

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Telephone Directory - Newspaper Advertising Bureau

Ad readership	Stu Tolley		704-4562
Advertising expenditures	Jim Conaghan		704-4558
Advertising rates	Jim Conaghan		704-4558
Automotive sales	Val Corradi	(313)	642-9200
CAN DO	Susan Lorenzana		704-4555
Color (ROP)	Charles Kinsolving		704-4544
Competitive media	Tom Fitzpatrick		704-4551
Co-op sales (NCN)	Frank Hennessey	(312)	644-1290
Coupon information	Chuck Lehman		704-4564
Food, supermarkets	Bob Gaines		704-4540
Information center	Ann Brady, Susan Hyer		704-4549
Inserts, preprints	Jack Aldinger, Ted Knecht		704-4520/1
Intermedia cost estimates	Uldis Grava		704-4550
Marketing services	Uldis Grava		704-4550
Membership information	Bill Solch		704-4530
National sales	Jim Wilson		704-4503
Newspaper circulation	Jim Conaghan		704-4558
Newspaper features/sections	Chuck Lehman		704-4564
Newspaper readership	Chuck Lehman		704-4564
NEWSPLAN	Jim Wilson		704-4503
New technology	Charles Kinsolving		704-4544
One Order/One Bill	Jack Aldinger, Ted Knecht		704-4520/1
Public Relations	Jim Dunaway		704-4547
Real Estate classified	Tony Marsella		704-4516
Recruitment advertising	Ira Gordon		704-4515
Retailing	Alfred Eisenpreis		704-4535
SAU™ (Standard Adv. Units)	Charles Kinsolving		704-4544
SMRB (Simmons) data	Chuck Lehman		704-4564
Telemarketing	Kitty Vance		704-4513
Total market coverage	Jack Aldinger		704-4521

(Unless otherwise stated, area code is 212.)

New York Office	(212) 921-5080
Chicago Office	(312) 644-1290
Detroit Office	(313) 642-9200
Georgia Office	(404) 949-4833
Los Angeles Office	(213) 480-0452
San Francisco Office	(415) 981-8118

NAB Services: New Technology

The oldest advertising medium in the United States is one of the most advanced in technological applications. Newspapers have launched a variety of electronic information services. Computerization and satellites have transformed every aspect of newspaper production. And electronic pressroom equipment is revolutionizing run-of-paper (ROP) color reproduction.

The New Technology department works closely with advertisers, agencies and newspapers to develop programs to make newspapers a more attractive, more economical, and easier-to-buy medium. The department is now focusing on improving ROP color reproduction and the standardization of newspaper special sections (e.g., TV logs).

The department also works closely with the Technical Committee of ANPA, the 4As and other organizations to track key developments in the new technologies, and their implications for the newspaper business.

Particular areas of interest of the department include:

- Standardization
- ROP Color
- Satellite Transmission (AD/SAT)
- Electronic Information Services
- Remote Entry
- Public Access Videotex
- Personal Computer Market
- Cable TV
- Electronic Newspaper Libraries

For more information on New Technology department activities, call Debbie Spitaletta at (212) 704-4542.

NEWSPLAN: Discounts for Continuity

ONE PROGRAM:

NEWSPLAN's purpose is to make national and regional advertising more effective by giving it the believability, immediacy and selling impact of ROP newspaper advertising at lower cost and greater convenience.

THREE BENEFITS:

Discounts - lower cost for the advertiser

By planning ahead, you can earn discounts from 10% to 30% or more with NEWSPLAN. Plan your advertising on an annual basis to make sure your cumulative space—in column inches or modular units—equals 6 pages, 13 pages or 52 pages. Discounts at these page levels are in effect in over 1,000 newspapers representing 82% of total U.S. circulation.

SAUs™ - simplified specs for the creative department

Thanks to Standard Advertising Units accepted by nearly 1,600 daily newspapers (98% of total circulation) one finished mechnical now covers all the newspapers in your schedule in most cases. (See pages 10, 11 and 12 for more details.)

CAN DO - better audience data for marketers and planners

CAN DO gives you net reach and frequency data for any daily or Sunday newspaper schedule and any geographic area, down to the county level. Audience figures can be run by sex, age, household income or household size. CAN DO computer runs are available through your own terminal if you are an IMS subscriber, or through NAB at cost.

For more information on NEWSPLAN, call Jim Wilson at (212) 704-4503.

Research Information on Consumers and Readers

Newspaper Advertising Bureau supports an active research program. The Research Department uses a variety of custom surveys, syndicated research and secondary sources to meet the needs of advertisers, advertising agencies and member newspapers. As of January 1987, the Research Department's list of in-print publications numbers more than 70 reports, brochures and research notes.

The subject areas covered include:

newspaper readership and audience data,
ad readership,
classified advertising,
competitive media,
retail shopping,
sales effects of advertising.

Reports can be obtained through member newspapers. A current list of in-print research publications is available on request. For more information, call Audrey Townsend at (212) 704-4565.

ANNUAL REPORTS PREPARED BY ECONOMIC AND MEDIA ANALYSIS UNIT, NEWSPAPER ADVERTISING BUREAU

1. Total advertising volume in the U.S., 1935-1985 (McCann-Erickson)
2. Newspaper advertising expenditures, 1945-1985. National, Retail and Classified
3. U.S. Daily and Sunday newspapers - 1945 to present - Number and Circulation
4. How much do people spend to read daily and Sunday Newspapers? 1945 to present
5. National advertising expenditures in measured media by classification
6. Daily newspapers in 317 MSAs: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page and full page
7. Daily newspapers in 212 ADIs: Households, coverage, etc.
8. Sunday newspapers in 317 MSAs: Households, coverage, etc.
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12. Cumulative circulation and rates of daily newspapers in 316 MSAs necessary to obtain 60% household coverage in each market
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24. Media breakdown of U.S. agencies billing $30 million or more
25. Newspapers not offering a 2% cash discount

Inquiries: Research Department, (212) 704-4611, -4612

CAN DO: Audience Data for Daily and Sunday Newspapers

The Newspaper Advertising Bureau's CAN DO program can:

produce detailed audience data for any list of daily and Sunday newspapers

provide data customized to any geographic or selected demographic definition

calculate reach, frequency, and frequency distribution estimates

allow media mix analyses through IMS data base for other media

deliver data output via an on-line computer system

CAN DO uses county building blocks to estimate audiences for all MSAs, ADIs, DMAs or customized areas contructed on whole county lines. And CAN DO provides estimates for the most important audience breaks—age, sex income, and household size.

If you wish to provide us with the total cost per insertion, CAN DO will give you specific cost-per-thousand information on your newspaper audience.

For further information, contact Susan Lorenzana at (212) 704-4555.

Where to Obtain Rate Information

Current information on ROP rates for daily and Sunday/weekend newspapers is available from the Media Analysis Unit of NAB. Contact Jim Conaghan at (212) 704-4558.

Through NAB's NEWSPLAN, over 1,000 newspapers with more than 82% of total weekday circulation offer discounts to national and regional advertisers who place ROP column inches or modular units equal to six or more pages per year. For more information, contact Jim Wilson at (212) 704-4503.

Current information on rates for preprints and inserts is available from Jack Aldinger at (212) 704-4521 or Ted Knecht at 704-4520.

Among the Media Analysis Unit reports that include rate information are the following:

MSA METROPOLITAN MARKETS BY HOUSEHOLDS (317 MSAs)

United States markets ranked by number of households in MSA. Lists all newspapers with at least .05 ratio of circulation to households or more than 25,000 circulation. Includes circulation-to-household ratios; metro and total circulation; inch rates; and cost of SAU quarter page, half page and full page. Published separately for weekday and Sunday/weekend editions.

ADI MARKETS BY HOUSEHOLDS (212 ADIs)

Comparable information, ranked by number of households in Area of Dominant Influence rather than by Metropolitan Statistical Area.

CUMULATIVE CIRCULATION AND RATES OF DAILY NEWSPAPERS IN 317 MSAs NECESSARY TO OBTAIN 60% HOUSEHOLD COVERAGE IN EACH MARKET

(For complete list of annual reports prepared by Economic and Media Analysis Unit of NAB, see page 5.)

NAB's One-Order/One-Bill Newspaper Placement Service

This service is set up to provide advertisers and agencies with all the information needed to plan and execute any type of multi-newspaper ROP or insert program, including costs, specifications and availabilities. For estimates and information, call Jack Aldinger or Ted Knecht at (212) 704-4520/21. They will handle all paper work, make reservations, issue insertion orders, provide proof-of-performance tearsheets and forward payment to every newspaper on the schedule, billing you on one invoice.

Free-Standing Insert Options

Today inserts can be distributed in nearly every daily and Sunday newspaper in the United States. Circulation achieved is more than 57 million daily and 59 million Sunday. Over 50% of all Sunday editions can distribute an insert in less than their full-run circulation, and more than 75% will accept a product sample attached to an insert. A similar proportion will accept an envelope, either empty or containing inserts or coupons.

Sizes are almost limitless. You can make an insert as large as anything that fits into the newspaper when folded, to 11" x 13", or as small as 5" x 7". Formats are equally varied: from a single page to a booklet of 96 pages or more. Inserts can be long or short and can include flaps, gatefolds, reply cards, coupons, perforations, fragrances, etc. Inserts can be printed on all types of paper, from ordinary newsprint to super-coated card stock.

Newspaper Co-op Network (NCN)

With just one call to Newspaper Co-op Network, manufacturers and advertising agecies can easily place dealer listing co-op ads in any number of markets. Through NCN, you can coordinate your local message with your national brand awareness advertising—and still include local dealer listings in each market. You place only one order and get one bill—NCN DOES ALL THE WORK!

NCN is a total marketing package that dramatically increases vertical movement. Here are ten of NCN's unique advantages:

FACT 1 One Order/One Bill makes newspapers easy to use for co-op and eliminates the hassle of multiple orders and invoices.

FACT 2 NCN is cost efficient—It eliminates administration costs and insures the best possible rates available for dealer list co-op advertising.

FACT 3 Stimulates local retailer involvement and produces new retail single-signature advertising.

FACT 4 Flexibility—Tailors newspaper coverage to your needs for any combination of regular or test markets.

FACT 5 Creative control—Advertiser controls both graphics and content.

FACT 6 Guaranteed-timing—Direct placement when and where you want it.

FACT 7 Localized monitoring—Provides a new measurement tool. National Sales Manager now evaluates local market dealer penetration.

FACT 8 Customization—Dovetails ad coverage with local representatives' sales areas or distributor/wholesaler territories.

FACT 9 Specialization—Trouble-shooting capability to solve immediate marketing problems, market by market.

FACT 10 Free sales help!—NCN's newspaper co-op managers act as an extension of your own sales force. (Newspapers have more than 26,000 retail sales people in the field.)

Best of all, NCN WORKS! Ask us for success stories. For more information on NCN, call Frank Hennessey at (312) 644-1295.

Standard Advertising Units (SAUs)™

The Standard Advertising Unit system simplifies the production and placement of newspaper advertising. The expanded SAU™ system introduced on July 1, 1984 received the endorsement of AAAA, ANPA, INAME, NAB and other organizations. Practically every daily newspaper in the U.S. accepts SAUs.

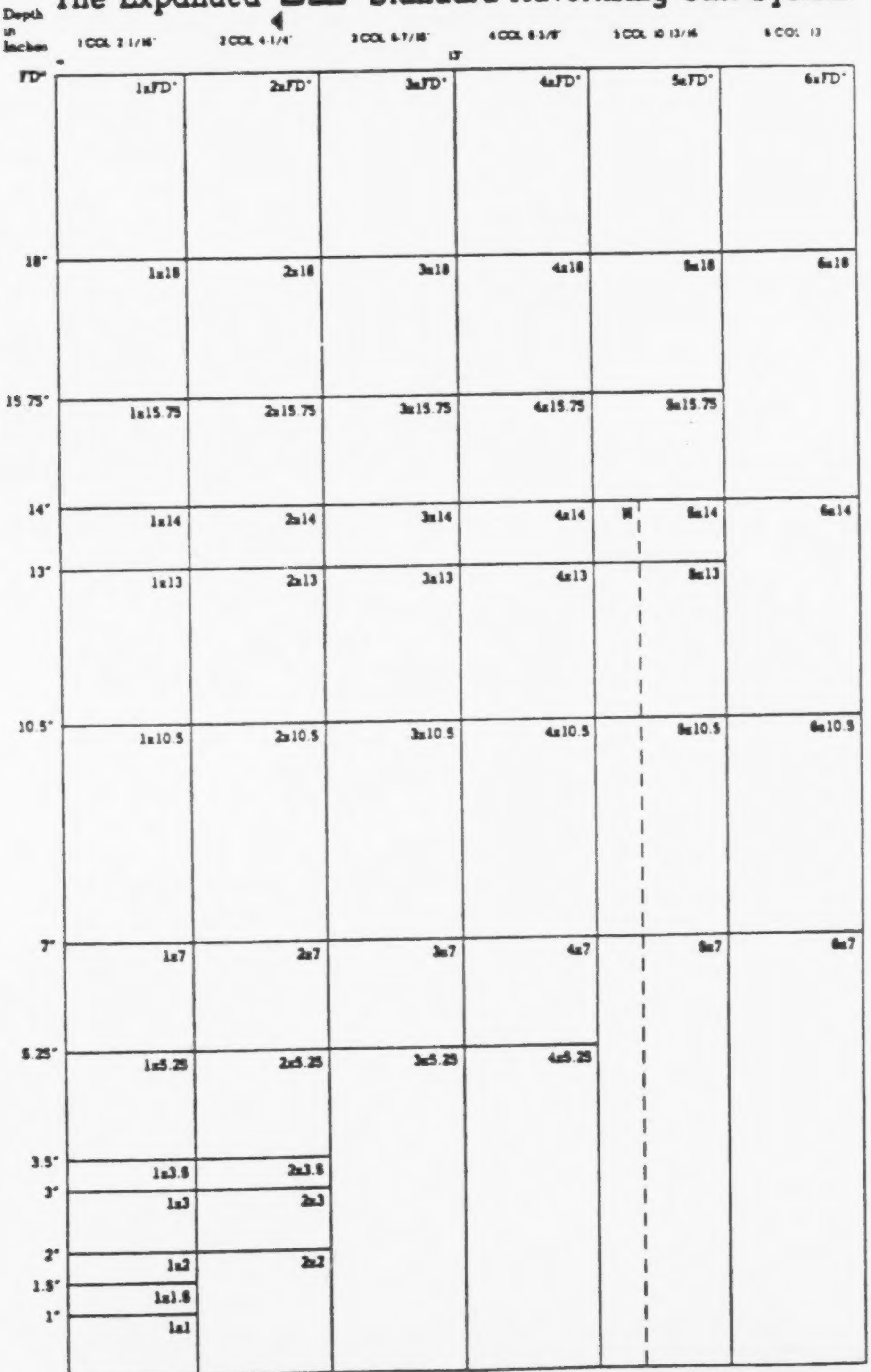
Broadsheet newspapers in full compliance with the system have a 6-column format for display advertising, a 13-inch printed page and a standard column width of 2 1/16 inches. Measurement and billing of advertising is based on the standard column inch.

Most tabloids have adopted a 5-column format with the same column width as broadsheets. There are special provisions for short cut-off tabloids. (The expanded SAU™ format chart on page 11 depicts 53 of the 57 advertising sizes developed, including the N size for short cut-off tabloids. The remaining four sizes are all double trucks, as noted.)

For more information or a full-scale SAU™ format chart, call Charles Kinsolving at (212) 704-4544.

(Effective July 1, 1984)

The Expanded SAU™ Standard Advertising Unit System


Depth in Inches
1 COL 2-1/16"
2 COL 4-1/4"
3 COL 6-7/16"
4 COL 8-5/8"
5 COL 10-13/16
6 COL 13
13"
FD*
1xFD*
2xFD*
3xFD*
4xFD*
5xFD*
6xFD*
18"
1x18
2x18
3x18
4x18
5x18
6x18
15.75"
1x15.75
2x15.75
3x15.75
4x15.75
5x15.75
14"
1x14
2x14
3x14
4x14
5x14
6x14
13"
1x13
2x13
3x13
4x13
5x13
10.5"
1x10.5
2x10.5
3x10.5
4x10.5
5x10.5
6x10.5
7"
1x7
2x7
3x7
4x7
5x7
6x7
5.25"
1x5.25
2x5.25
3x5.25
4x5.25
3.5"
1x3.5
2x3.5
3"
1x3
2x3
2"
1x2
2x2
1.5"
1x1.5
1"
1x1

1 Column 2-1/16"
2 Columns 4¼"
3 Columns 6-7/16"
4 Columns 8⅝"
5 Columns 10-13/16"
6 Columns 13"

Double Truck 26¾"
(There are four suggested double truck sizes.)

13xFD* 13x18
13x14 13x10.5

*FD (Full Depth) [illegible]

Tabloids: [illegible]

Newspaper Advertising Bureau, Inc.
[illegible]

Fractional Pages: Column Inch Equivalents, With Standard Advertising Unit Options

Broadsheet

Full page = 126 column inches

6 x 21 (full depth)

Two-thirds page = 84 column inches

4 x 21 (full depth)
6 x 14

Half page = 63 column inches

3 x 21 (full depth)
4 x 15.75
6 x 10.5

One-third page = 42 column inches

2 x 21 (full depth)
3 x 14
4 x 10.5
6 x 7

Quarter page = 31.5 inches

2 x 15.75
3 x 10.5

One-sixth page = 21 column inches

1 x 21 (full depth)
2 x 10.5
3 x 7
4 x 5.25

Tabloid*

Full page = 70 column inches

5 x 14

Four-fifths page = 56 column inches

4 x 14

Three-fifths page = 42 column inches

3 x 14
4 x 10.5

Half page = 35 column inches

5 x 7

Two-fifths page = 28 column inches

2 x 14
4 x 7

One-fifth page = 14 column inches

1 x 14
2 X 7

One-tenth page = 7 column inches

1 x 7
2 x 3.5

* May not apply to the New York Daily News, Newsday and other short cut-off tabloids. Consult individual newspaper for equivalents.

Estimating Intermedia Advertising Costs

Media planners often need to compare the cost of various advertising media. One approach to the problem is to use common universe standards as a media base. The Area of Dominant Influence* (ADI) is a geographic unit that lends itself to this purpose, since the 212 ADIs account for the total land area of the United States.

Intermedia cost estimates can be expressed in terms of households or standard demographic age/sex cells because current figures are available for both broadcast and newspapers. Since major advertisers and agencies are usually concerned with advertising schedules rather than single insertions, the logical measure for potential exposure is Gross Rating Points (GRPs).

The table on page 14 illustrates how GRPs can be used for intermedia comparisons, in this case between TV and newspapers. This table compares the cost-per-household GRP of the quarter-page newspaper space unit (31.5 column inches) with the 30-second commercial unit. The TV daypart used is prime because this is the time period offering a large dual audience, most comparable in size and composition to newspapers.

The figures shown represent a conservative estimate at national open rates, used in the initial stage of setting up a media plan. A final plan specifying particular TV programs and newspapers (with local or earned volume discounts) would show better efficiencies in cost-per-thousand audience delivery.

For further details contact Uldis Grava at (212) 704-4550.

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* This statement applies to the Designated Market Area (DMA) as well.

Newspaper vs. Television: Top 20 ADI Markets
HH Universe and Cost/HH GRP Comparison

ADI Market	HH (000s)	30 second Primetime Spot TV Cost/HH GRP	31.5 inches Daily Newspapers Cost/HH GRP
1. New York	6,870	$557	$624
2. Los Angeles	4,612	$593	$426
3. Chicago	3,090	$270	$299
4. Philadelphia	2,655	$229	$240
5. San Francisco	2,105	$300	$231
6. Boston	2,048	$284	$220
7. Detroit	1,695	$151	$210
8. Dallas/Ft. Worth	1,572	$232	$172
9. Washington, DC	1,551	$158	$174
10. Houston	1,432	$228	$115
Total: Top 10	27,630	$3,002	$2,711
11. Cleveland	1,428	$103	$112
12. Atlanta	1,203	$145	$132
13. Pittsburgh	1,224	$112	$140
14. Miami	1,189	$188	$162
15. Minneapolis/St. Paul	1,199	$123	$145
16. Seattle/Tacoma	1,213	$156	$118
17. Tampa/St. Petersburg	1,070	$124	$ 89
18. St. Louis	1,059	$ 92	$101
19. Denver	1,023	$107	$ 94
20. Sacramento	968	$ 93	$108
Total: Top 20	39,206	$4,245	$3,912

Sources: Media Market Guide, 1st Qtr 1987; PEP Media Database, Spring 1987

A Few Common Newspaper Terms

AD/SAT™	The Satellite Network for Advertising Delivery provides high-resolution facsimile transmission newspaper advertising, by satellite, in minutes.
Broadsheet:	A "standard" or large-size newspaper. In July 1984, most broadsheet dailies adopted a uniform, 13-inch printed page width and a full depth of 21" or deeper, up to 22 1/2".
Circulation:	The number of copies sold or distributed. For the more than 90% of weekday circulation audited by the Audit Bureau of Circulation, the term always denotes paid circulation.
Color scanner:	Electronic equipment that automatically produces separations for ROP process (or "full") color.
Column inch:	Space measurement one column wide and one inch deep. (See "SAUs", pp 10,11,12.)
Double truck:	Two facing pages used for a single unbroken advertisement. Also called a two-page spread.
Facsimile transmission:	The electronic transmission of a page image (usually to printing plants at other sites).
Front-end system:	A total computer system for text entry, editing, formatting and/or billing, for editorial, display advertising and/or classified advertising.
Newsprint:	The uncoated, machine-finished paper used for printing newspapers.
Pagination system:	A computerized makeup system for composing whole pages of type, line art and halftones.
ROP ("run-of-paper"):	ROP is a term generally applied to ads that appear on a newspaper page (as distinguished from inserts or preprints).
Scotch double truck:	A single unbroken advertisement on two facing pages bordered by one full column of editorial on each of its vertical sides and by shallow columns of editorial across the top.
Tabloid:	A newspaper with a smaller page size than a broadsheet. A full tabloid page is usually 14 inches deep. The width varies from 9 3/8" ("short cut-off") to 10 13/16" ("long cut-off").

How Newspaper Advertising Works

The daily newspaper is a unique advertising medium that readers value as a useful source for many kinds of information. The most common way of reading the paper is to start with the front page and go through the issue page by page, scanning it for articles and ads that look "interesting". Readers know the difference between editorial content and advertising, but in practice they don't pay much attention to this distinction.

The human eye's efficiency as a scanning device makes it easy for readers to find the articles and ads they want to read. As a result, interest in newspaper ads is highly correlated with buying interest:

Average Interest Level in Newspaper Ads
(by Prospect Status)

	Interest in Ad
Prospects:	
I ("hottest" prospects)	87%
II	75
III	47
Non-prospects:	
IV	48%
V	37
VI ("coldest" non-prospects)	14

Source: Newspaper Advertising Bureau collation of surveys by individual newspapers, 1985-1986.

This close link between prospect status and interest in advertising may seem self-evident, but it does not necessarily hold for other media in which advertisers depend on novelty, humor or celebrity presenters to attract the consumer's attention.

Editorial Environment: Newspaper Sections and Features

The daily and Sunday newspaper provide varied editorial environments to meet the needs of almost any advertiser. On request, more than eight out of ten U.S. newspapers will position advertising near appropriate content, usually without charge.

A 1986/87 survey of newspapers enables NAB to supply a computerized list of newspapers that regularly carry a specific section or feature. This list, alphabetized by state and by city within state, tells which days of the week the section or feature runs, as well as the newspaper's policy on positioning.

SECTIONS on which information is available include:

Business, Finance
Entertainment
Fashion
Food
Home
Lifestyle, Women
Science
Sports
TV, Radio
Travel

FEATURES (partial listing):

Advice on personal finance
Astrology
Automotive
Beauty

Best food buys
Books
Business, financial
Career advice

College
Computers (personal)
Diet, nutrition
Fashion, men

Fashion, women
Fashion, teenage
Games and puzzles
Gardening

Health and medical
Home repair, building
Home furnishings
Movie timetable

Music, records, tapes
Op Ed page
Outdoors: camping, etc.
Personal advice

Pets
Physical fitness
Real estate
Recipes

Religion
Restaurants
Science
Stamps, coins

Theater
Travel & resort
Weather map
Wine

For information, call Chuck Lehman at (212) 704-4564.

Kinds of Newspaper Items and Advertising "Usually Read"
(by sex)

Editorial	Total Adults	Men	Women
News about local community	89%	87%	90%
News about economy, jobs, inflation	86	89	83
International or world news	84	88	80
News about President, Congress	78	82	75
News briefs, summary of news	77	79	76
News about local politics, gov't.	74	77	72
News about celebrities	71	65	77
TV program listings	67	65	70
Advice columns	65	46	81
Calendar of local events	61	57	65
Letters to the editor	60	57	63
Food pages	59	33	81
Editorials, editor's opinions	58	58	58
Comic strips, "funnies"	57	61	55
Obituaries	53	46	59
Sports news: local schools	51	63	40
Business and financial news	50	60	41
Sports news: professional teams	49	71	29
Political opinion columns	47	52	43
Book reviews	29	24	33
Crossword puzzles	23	19	27
Advertising			
Supermarket ads	64%	45%	80%
Store ads for clothing	62	46	76
Classified or want ads	60	64	57
Movie ads	56	56	55
Base: Total newspaper readers = 100%	(1,803)	(837)	(966)

Source: Audits & Surveys, Inc, 1982

Question: Each of these cards contains a different kind of news, feature or advertising item appearing in most daily newspapers. Please look through them and put to one side the kinds of things you don't usually read or look at.

The best newspaper readers are also the best customers for many products and services.

A Profile of the Average Weekday Audience

Demographic Segment	Percent Coverage	Index*
HH income $60,000 or more	77%	123
College graduate	77	122
HH income $50,000 or more	77	122
Own home valued at $100,000 or more	76	121
Manager, administrator	75	119
HH income $40,000 or more	75	119
Professional	75	118
Own home valued at $70,000-$99,999	73	116
Age 55-64 years	73	116
HH income $30,000 or more	73	115
Northeast Census region	72	114
HH income $30,000 - $39,999	69	109
Own home valued at $50,000-$69,999	69	109
One-three years college	69	109
Technical/clerical/sales occupation	68	109
Age 45-54 years	68	108
Suburban resident	67	107
County size B resident	67	106
Midwest Census region	66	105
Age 35-44 years	66	105
Two-person household	65	104

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

* Average weekday coverage of total adults = 100.

Daily Newspaper Audience
(Average Weekday)

	Number (millions)	Percent of Population (Coverage)	Percent of Audience (Composition)
Total Adults	107.8	63%	100%
By sex:			
Men	52.6	65%	49%
Women	55.2	61	51
By age:			
18-24 years	14.8	53%	14%
25-34 years	23.5	58	22
35-44 years	20.4	66	19
45-54 years	15.3	68	14
55-64 years	16.2	73	15
65 years or older	17.6	65	16
By education:			
College graduate	22.5	77%	21%
1-3 years college	21.0	69	20
High school graduate	43.6	65	40
Some high school or less	20.7	47	19
By household income:			
$60,000 or more	11.7	77%	11%
$50,000 or more	18.4	77	17
$40,000 or more	32.3	75	30
$30,000 - $39,999	18.5	69	17
$20,000 - $29,999	23.1	64	21
$10,000 - $19,999	22.3	57	21
Under $10,000	11.5	44	11
By occupation:			
Professional, manager	19.9	75%	19%
Technical, clerical, sales	22.6	68	21
Precision, craft	8.4	57	8
Other employed	17.2	58	16
Not employed	39.7	59	36

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

Sunday/Weekend Newspaper Audience
(Average Sunday/Weekend)

	Number (millions)	Percent of Population (Coverage)	Percent of Audience (Composition)
Total Adults	109.8	64%	100%
By sex:			
Men	52.3	65%	48%
Women	57.5	64	52
By age:			
18-24 years	15.9	57%	15%
25-34 years	26.0	64	23
35-44 years	20.7	67	19
45-54 years	15.0	67	14
55-64 years	15.4	70	14
65 years or older	16.7	62	15
By education:			
College graduate	23.4	80%	21%
1-3 years college	22.0	72	20
High school graduate	44.2	66	40
Some high school or less	20.2	46	19
By household income:			
$60,000 or more	12.2	81%	11%
$50,000 or more	19.1	80	17
$40,000 or more	34.1	79	31
$30,000 - $39,999	19.5	72	18
$20,000 - $29,999	23.3	64	21
$10,000 - $19,999	21.8	56	20
Under $10,000	11.1	42	10
By occupation:			
Professional, manager	20.7	77%	19%
Technical, clerical, sales	23.6	71	22
Precision, craft	9.0	61	8
Other employed	16.9	57	15
Not employed	39.6	59	36

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

The Reading of Daily Newspapers

Average number of times read or looked at and
average time spent reading dailies yesterday
by day of the week and number of papers read*

	Avg. No. Times Read/Looked at Newspaper	Avg. Time Spent Reading (minutes)
Monday		
Read one daily	1.5	38
Read two or more dailies	3.0	61
Tuesday		
Read one daily	1.5	40
Read two or more dailies	2.7	59
Wednesday		
Read one daily	1.5	38
Read two or more dailies	3.1	59
Thursday		
Read one daily	1.6	42
Read two or more dailies	3.2	72
Friday		
Read one daily	1.6	39
Read two or more dailies	2.8	58
All Yesterday Readers (Total N = 1,352)	1.8	44

* Audits & Surveys, Inc, 1982: National sample of 1,979 adults interviewed in person about "yesterday's" newspaper reading. Interviews were equally distributed across the week, Tuesday through Saturday; "yesterday reading" behavior was probed for three dayparts.

Source: Newspapers in American News Habits,
Newspaper Advertising Bureau, 1986.

Page Opening: Daily Newspaper Pages or Sections Usually Read

(Total adult readers, by sex)

	Percent of Weekday Audience:		
	Adults	Men	Women
Usually read every page	63%	63%	62%
Read certain pages or sections	37	37	38
Business, finance	76	78	74
Classified	76	76	76
Comics	76	76	77
Editorial page	78	77	79
Food, cooking	77	71	82
General news	92	92	93
Home furnishings, gardening	74	71	78
Sports	80	88	72
TV, radio listings	76	75	78
Projected base: Average weekday audience (in 000s)	(107,753)	(52,597)	(55,156)

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

For details on other demographic segments, see:
Daily Newspaper Page Opening: Pages and Sections Usually Read, Newspaper Advertising Bureau, 1987.

Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration

	Number of Weekday Issues:			
One Issue Reach:	Two	Three	Four	Five
15% Reach	19%	22%	23%	25%
Average Frequency	1.6	2.1	2.6	3.1
20% Reach	26%	29%	31%	33%
Average Frequency	1.6	2.1	2.6	3.1
25% Reach	32%	36%	39%	41%
Average Frequency	1.6	2.1	2.6	3.1
30% Reach	38%	43%	46%	48%
Average Frequency	1.6	2.1	2.6	3.1
35% Reach	45%	50%	54%	56%
Average Frequency	1.6	2.1	2.6	3.1
40% Reach	51%	57%	61%	64%
Average Frequency	1.6	2.1	2.6	3.1
45% Reach	58%	64%	68%	71%
Average Frequency	1.6	2.1	2.6	3.2
50% Reach	64%	71%	75%	78%
Average Frequency	1.6	2.1	2.7	3.2
55% Reach	70%	78%	82%	85%
Average Frequency	1.6	2.1	2.7	3.2
60% Reach	77%	84%	88%	91%
Average Frequency	1.6	2.1	2.7	3.3

Note: These estimates assume a turnover rate of 28%, which is average for metropolitan newspapers. Turnover rates, which are determined by the ratio of the two-issue reach to the one-issue reach, range from about 16% to 36%. Since the reach and frequency patterns for individual newspapers vary, these estimates should be used only in the absence of local data.

Source: Audits & Surveys, Inc.;
Newspaper Advertising Bureau.

Number of Daily and Sunday Newspapers in the United States

Year	Morning	Evening	All Day	Total Daily	Sunday
1983	417	1,255	29	1,701	772
1984	431	1,230	27	1,688	783
1985	456	1,196	26	1,678	798

Circulation of Daily and Sunday Newspapers in the United States
(in millions)

Year	Morning	Evening	Total Daily	Sunday
1983	33.8	28.8	62.6	56.7
1984	35.4	27.7	63.1	57.6
1985	36.4	26.5	62.9	58.8

(Circulation of all-day newspapers is apportioned between "Morning" and "Evening".)

1985 Newspaper Data for Canada

	Morning	Evening	Total Daily	Sunday/ Weekend
Number of newspapers	28	86	111	22
Circulation (millions)	3.0	2.4	5.4	3.3

(Three all-day newspapers counted both in AM & PM columns, but only once in the total. Circulation for these papers is equally divided between AMs and PMs.)

How Much Do People Spend to Read Daily and Sunday Newspapers?
1985 Estimate of Annual Expenditures in the United States
(in billions of dollars)

Weekday	Sunday	Total
$5.23	$2.43	$7.66

Sources: SRDS, Editor and Publisher Yearbook; ABC; CARD.
Prepared by Newspaper Advertising Bureau, Inc.

Readers-per-Copy Estimates for Total U.S.

	Weekday	Sunday/Weekend
Adults	2.12	2.12
Men	1.07	1.02
Women	1.05	1.10

Sources: Estimate by Newspaper Advertising Bureau, based on 1986 SMRB Study of Media & Markets; Editor and Publisher Yearbook, 1986.

Weekday Newspaper Readers-per-Copy in Top 25 ADIs

Total: Top 25 ADIs	2.77
Markets 1 - 5	2.93
Markets 6 - 10	2.64
Markets 11 - 25	2.64

Source: Simmons-Scarborough Syndicated Research Associates, 1985.

Average Weekday Coverage of Professionals and Managers

	Total U.S. (in millions)	Daily Readers (in millions)	Percent of Total
Total professionals & managers	26.8	19.9	75%
Individual employment income of $35,000 & over	8.2	6.6	81%
College graduate	17.3	13.5	78%
Involved in desk top computer purchase decisions	2.5	1.9	76%
Manage or influence investments of institutional or corporate funds	1.6	1.2	80%

Source: 1986 SMRB Study of Media & Markets.

The size of the daily audience varies little over the five weekdays...

Index of Daily Newspaper Readership by Adults

	Average Weekday	Monday	Tuesday	Wednesday	Thursday	Friday
Total adults	100	98	100	102	100	101
Men	101	99	101	102	102	100
Women	99	97	98	102	98	101

Source, Audits & Surveys, Inc, 1982.

...mainly because most newspaper readers are subscribers.

How Daily Newspapers Read Yesterday Were Obtained

	Weekday	Sunday
Subscribe, delivery	70%	63%
Bought single copy	20	31
Family member brought home	2	2
Obtained otherwise	8	4

Source: Response Analysis Corporation, 1986.

And newspaper reach is virtually constant throughout the year.

Index of Month-by-Month Circulation

	J	F	M	A	M	J	J	A	S	O	N	D
AM	101	101	101	101	100	99	97	98	99	101	101	100
PM	99	100	100	100	100	100	99	99	100	101	101	101
Sun/wknd	100	101	101	101	100	99	98	98	100	101	101	100

* Average month circulation = 100.

Source: Media General, Inc, survey of ICMA members. Data cover the years 1976-1980 and are weighted by circulation size and geographic region to represent national totals.

Creativity in Newspaper Advertising

Creativity is the vital ingredient for success in any advertising medium. An extensive analysis of readership scores for newspaper ads shows that the Starch Noted scores for two ads of the same size and product category can vary by ratios of two to one.

"Objective" ad characteristics such as typeface, the presence of a package illustration, or the position of the headline, account for only small differences in attention value and interest, and formulas that recommend using overworked headline words like "new" cannot guarantee high readership.[1]

The use of very general principles can be helpful: Keep the layout uncluttered. Suit the artwork to the newspaper medium. Use illustration and headline to communicate product benefits. However, general principles have limited value if the creative spark is missing.

The Creative Newspaper, available through NAB's members, reproduces outstanding creative efforts in every advertising category, and shows how progressive advertisers are taking advantage of the newspaper's new color capabilities and improved reproduction.

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1) For further details, see: Research Facts on Position, Timing and Creativity; also, Creative Variables and Ad Readership, Newspaper Advertising Bureau.

Estimating Ad Readership

Page opening is the accepted measure of opportunity for advertising exposure. Other measures, such as Starch "Noted" scores, are also widely used as indications of a specific ad's attention value. It is well known that any such measure varies with the nature of the advertised product, size of ad and creative treatment.

Only a readership survey can provide reliable clues to a specific ad's attention value, but in the absence of a survey, average reported readership for a large number of ads may be useful. Average reported readership figures also provide a useful benchmark for evaluating the performance of individual measured ads.

Percent of Ads Read on Opened Pages
(by size of ad)

Less than one-quarter page	12%
One-quarter to less than half page	17%
Half to less than full page	25%
Full page or more	44%

Source: Audits & Surveys, Inc, 1982. (Unweighted base is 16,605 ads of five column inches or more appearing on randomly selected sample pages of newspapers read "yesterday". For more details, see Newspaper Pages, Ads and Readers, Newspaper Advertising Bureau, 1984.)

Ad readership varies little whether the ad appears on the left or right side of the page...

	Left	Right
Men	99	102
Women	100	100

...above or below the fold...

	Above Fold	Below Fold
Men	99	101
Women	100	100

...or in the gutter or outside position.

	Gutter	Outside
Men	100	101
Women	101	100

But...editorial environment can affect performance.

Advertisements for Products of
Interest to Both Men and Women

Type of Page:	Men	Women
Sports	114	49
Food, home	63	101
General news	100	101

NOTE: Index - Starch "Noted" score for average ad = 100.

Source: M&N Starch studies of 32,000 newspaper ads. For more details, see Research Facts on Position, Timing and Creativity, Newspaper Advertising Bureau, 1986.

Multiple Insertions: How Advertising Exposure Accumulates

Attempting to obtain direct measures of the number of people reached by multiple ad insertions is impractical, whatever the medium. However, if it can be assumed that the likelihood of newspaper readers seeing one or more ads in a campaign is approximately the same as the likelihood of seeing one or more in a single newspaper issue with the same total number of insertions, then it is possible to estimate the cumulative effect of multiple insertions.

The first step is to establish the average exposure level for a single insertion, either through custom research or by the use of an estimate. Given this base figure, it can be assumed that multiple insertions will build along the lines shown in the following table.

Estimated Net Reach and Frequency for Multiple Ad Insertions

Average for		Number of Ads in Campaign:					
Single Insertion:		Two	Three	Four	Five	Six	Seven
20%	net reach:*	30%	38%	45%	50%	55%	58%
	avg. freq:	1.3	1.6	1.8	2.0	2.2	2.4
25%	net reach:	37%	46%	53%	59%	63%	66%
	avg. freq:	1.4	1.6	1.9	2.1	2.4	2.6
30%	net reach:	43%	53%	61%	67%	71%	74%
	avg. freq:	1.4	1.7	2.0	2.2	2.5	2.8
35%	net reach:	50%	60%	68%	74%	78%	80%
	avg. freq:	1.4	1.8	2.1	2.4	2.7	3.1
40%	net reach:	55%	65%	73%	79%	83%	85%
	avg. freq:	1.5	1.8	2.2	2.5	2.9	3.3
45%	net reach:	60%	70%	78%	84%	87%	89%
		1.5	1.9	2.3	2.7	3.1	3.5

* Net reach = percent of exposed audience reached one or more times.

Source: "Yardstick of Accumulative Newspaper Ad Readership"

Newspaper Advertising Expenditures*
(billions of dollars)

	National	Retail	Classified	Total
1977	$1.5	$6.2	$3.0	$10.7
1979	1.8	7.8	4.2	13.9
1981	2.3	9.7	4.6	16.5
1983	2.7	11.8	6.0	20.6
1984	3.1	12.8	7.7	23.5
1985	3.4	13.4	8.4	25.2

* Production costs included.

Source: McCann-Erickson, Inc; NAB estimates for classified.

Newspaper Insert Advertising Volume

	Free-Standing Inserts (Card & Multi-Page) (billions)	Free-Standing Insert Revenue** (billions)
1977	20.1	$1.1
1979	27.1	1.8
1981	28.7	2.3
1983	35.7	3.1
1984	41.3	3.7
1985	45.4	4.2

** Printing costs included.

Estimated Tabloid (10 3/4" x 13") Insert Costs
For All Sunday Newspapers Published Within PMSA

PMSA (Top)	Number of Newspapers	Circulation in Millions	Cost per 1,000				
			2 Pages	4 Pages	8 Pages	12 Pages	16 Pages
10	46	15.5	36.76	37.34	43.35	48.85	53.07
25	107	23.9	36.80	37.44	43.37	49.04	53.31
50	167	33.5	36.33	37.75	43.50	49.14	53.48
75	221	39.2	36.85	38.26	43.69	49.27	53.64
100	259	42.6	36.86	38.27	43.78	49.34	53.75
150	327	47.5	36.89	38.42	44.10	49.52	54.06
200	387	50.7	36.93	38.58	44.37	49.70	54.19
250	431	52.4	37.01	38.80	44.61	49.97	54.37
315	493	54.4	37.22	39.08	44.86	50.19	54.54

Sources: Circulation '86/87; individual newspapers;
Newspaper Advertising Bureau.

ROP Color: Availability and Premiums

The great majority of newspapers offer ROP color advertising. In the 317 MSA markets, SAU™ quarter-page ads in BW&1C can reach 68% of the total weekday circulation. Full-page ads in BW&3C can reach 89% of the total circulation.

Cumulative Percent of Total Circulation Represented by Daily Newspapers Offering ROP Color[a]

	Accept SAU Quarter-Page Ad			Accept SAU Full-Page Ad		
	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
Top 50 MSAs	58.8%	50.9%	49.2%	91.4%	86.1%	83.1%
Top 100 MSAs	62.3	53.8	52.0	93.4	88.5	85.9
Top 200 MSAs	66.5	59.3	57.8	94.5	90.4	88.2
All 317 MSAs	68.2	61.6	60.2	95.0	91.2	89.2

a) All daily newspapers with at least .05 ratio of circulation to households, or more than 25,000 circulation in the MSA.

Percent Color Premium Above Black and White Cost

	SAU Quarter Page			SAU Full Page		
MSA Rank	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
1 - 100	41%	55%	65%	12%	17%	20%
101 - 200	47	68	85	13	18	22
201 - 317	47	71	94	12	18	24
Total 317	43%	60%	74%	12%	17%	21%

Sources: ANM Circulation '83/'84; SRDS, July 1984.
Prepared by Newspaper Advertising Bureau.

TOTAL U.S. ADVERTISING VOLUME
(Billions of dollars)

	1983		1984		1985 (r)	
Medium:	Billions	% Share	Billions	% Share	Billions	% Share
Newspapers total	$20.6	27.1%	$23.5	26.8%	$25.2	26.6%
national	2.7	3.6	3.1	3.5	3.4	3.5
local	17.8	23.5	20.4	23.3	21.8	23.0
Magazines total	$ 4.2	5.6%	$ 4.9	5.6%	$ 5.2	5.4%
weeklies	1.9	2.5	2.2	2.5	2.3	2.4
women's	1.1	1.4	1.2	1.4	1.3	1.4
monthlies	1.3	1.7	1.5	1.7	1.6	1.7
Farm Publications	$ 0.2	0.2%	$ 0.2	0.2%	$ 0.2	0.2%
Television total	$16.5	21.8%	$19.7	22.4%	$20.8	21.9%
network	7.0	9.3	8.5	9.7	8.3	8.7
spot	4.8	6.4	5.5	6.2	6.0	6.3
cable (national)	0.3	0.4	0.5	0.6	0.6	0.7
local	4.3	5.7	5.1	5.8	5.7	6.0
cable (local)	0.1	0.1	0.1	0.1	0.1	0.1
Radio total	$ 5.2	6.9%	$ 5.8	6.6%	$ 6.5	6.8%
network	0.3	0.4	0.3	0.4	0.4	0.4
spot	1.0	1.4	1.2	1.4	1.3	1.4
local	3.9	5.1	4.3	4.9	$ 4.8	5.1
Direct Mail	$11.8	15.6%	$13.8	15.7%	$15.5	16.4%
Business Papers	$ 2.0	2.6%	$ 2.3	2.6%	$ 2.4	2.5%
Outdoor total	$ 0.8	1.0%	$ 0.9	1.0%	$ 0.9	1.0%
national	0.5	0.7	0.6	0.6	0.6	0.6
local	0.3	0.4	0.3	0.4	0.3	0.4
Miscellaneous total	$14.3	18.8%	$16.8	19.1%	$18.2	19.2%
national	7.3	9.7	8.8	10.1	9.6	10.1
local	7.0	9.2	7.9	9.0	8.6	9.1
Total National	$42.5	56.1%	$49.7	56.6%	$53.4	56.3%
Total Local	$33.3	43.9%	$38.1	43.4%	$41.4	43.7%
GRAND TOTAL	$75.9	100.0%	$87.8	100.0%	$94.8	100.0%

(r): Revised.

Estimates include all costs: time & talent, space & production.
Sources: McCann-Erickson, Inc; Newspaper Advertising Bureau.
Prepared by Research Department, (212) 704-4558.

Newspapers continue to be the number-one medium for coupons.

Distribution Pattern of Manufacturers' Cents-Off Coupons

	1986	1985	1984
Newspapers	83.7%	82.2%	82.1%
ROP Solo	7.4	12.2	17.3
Co-op (All)	7.1	8.0	10.0
Free-Standing Insert	68.0	59.9	51.5
Sunday Magazine	1.2	2.1	3.3
Magazines	6.5	8.6	8.5
Direct Mail	4.0	4.4	4.4
In/On Package	5.8	4.8	5.0

Source: Manufacturers Coupon Control Center, 1987.

MC3 also reports that consumer use of coupons surged in 1986. In all, consumers redeemed 7.32 billion manufacturer coupons this past year, based on industry estimates developed by Manufacturers Coupon Control Center. This reflects a 13% increase over the 6.49 billion coupons redeemed in 1985. In the last four years, redemption of coupons increased by 63%, rising from 4.48 billion in 1982 to 7.32 billion during this latest year.

Using coupons, consumers saved a total of $2.75 billion on their shopping bills in 1986.

Food Shopping

The homemakers who spend the most on groceries are the best newspaper readers.

Amount Spent in Average Week:	Coverage Average Weekday	 Average Sunday
$40 or less	56%	56%
$41 - $70	62	65
$71 or more	65	69

About one third of those doing major food shopping within the past four weeks favor "no particular day" of the week. 46% do their major food shopping of Thursday, Friday or Saturday.

Major Food Shopping - Day of Week Usually Shop

	Adults	Men	Women
Monday	4%	3%	5%
Tuesday	4	4	4
Wednesday	7	7	6
Thursday	10	9	10
Friday	18	18	19
Saturday	18	18	19
Sunday	4	4	4
No particular day	35	37	33
Projected totals (in millions)	(124.4)	(48.6)	(75.8)

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

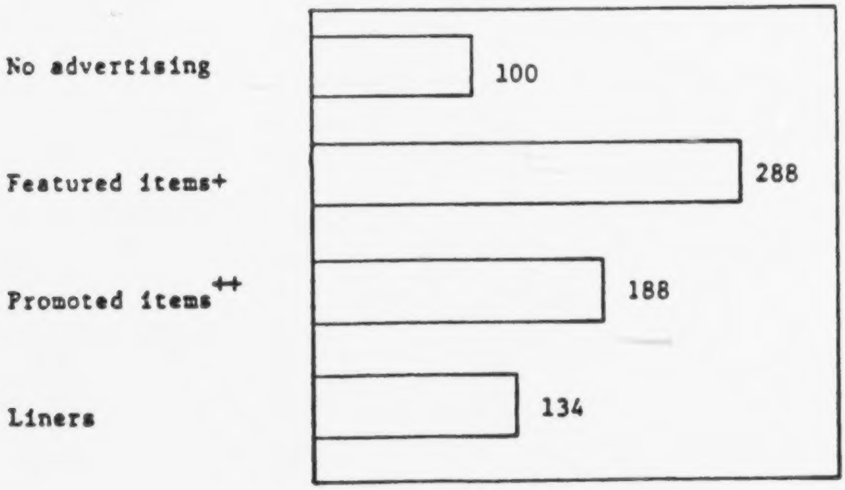
How Newspaper Advertising Affects Package Goods Sales

In 1980, computerized scanner records were used to analyze the effect of ad linage and price cuts on product movement. The analysis covered 479 items appearing in 20 ads from 17 stores. Unit and dollar sales were recorded for the week of the ad and two weeks before the ad (the base period).

Results show that, on average, newspaper advertising triples the volume of items advertised at cut prices. The sales effectiveness of newspaper ads doesn't depend on price cuts--advertising goods at regular prices doubles sales.

The movement of items advertised at regular prices is closely tied to the amount of advertising space given an item.

Sales Results For Items Advertised At Regular Prices



[+] Four square inches or more.

[++] Larger than a liner but less than four square inches.

Retail Shopping

Percent of This Week's Purchases Not Planned Last Week

	Percent Unplanned
Women's wear (average, all items)	86%
Men's wear	82
Children's, infants' wear	85
Stationery, gift items	76
Major appliances, TV, stereo	88
Furniture, furnishings	79
Household textiles, sewing items	85
Housewares and supplies	95
Sporting goods	85

Advertising Influence on Last Unplanned Purchase

	Saw or Heard Advertising		Source of Advertising
Total reporting unplanned purchase	41%	=	100%*
Newspaper			60%
Television			17
Direct Mail			15
Magazine			6
Radio			5
Something left at door			3
No answer			1

* Total exceeds 100% because of multiple answers.

Source: Response Analysis Corporation, 1982.

(For more details, see How America Shops and Buys,
Newspaper Advertising Bureau, 1983.)

For men, the most popular day for general merchandise shopping is Saturday. For women, it's "no special day".

Day of Week Main Shopping Likely to Occur

(Women)

	Toiletries, Drugs	Clothing	Sheets, Towels, etc	Appliances	New Car
Monday.............	7%	6%	5%	5%	6%
Tuesday............	5	4	3	3	2
Wednesday..........	9	7	6	3	4
Thursday...........	15	5	5	3	4
Friday.............	20	11	9	6	8
Saturday...........	16	34	32	33	27
Sunday.............	2	2	3	3	3
No special day.....	25	31	35	43	45

(Men)

	Clothing	Appliances	New Car
Monday..............	5%	5%	8%
Tuesday.............	4	4	2
Wednesday...........	6	5	4
Thursday............	5	4	4
Friday..............	16	12	10
Saturday............	42	42	39
Sunday..............	2	2	4
No special day......	19	26	29

Source: R. H. Bruskin Associates, The Bruskin Report, #128, October 1984.

Most Believable Advertising Medium

	Percent Selecting
Newspaper	48%
Television	21
Direct mail	8
Magazines	8
Radio	4
All media equally believable	5
No answer	6

Source: Henry Senft Research Associates, Inc., 1986

The Selling Power of ROP Color

Advertisers know that color increases the effectiveness of their ads. Color attracts attention, generates excitement and enhances the appeal of advertising.

A 1985 split-run study[1] by four newspapers testing 12 ads showed that the color ads outsold the same ads in black and white by 42%.

---

1) For further details, see The Selling Power of ROP Color, Newspaper Advertising Bureau, 1986.

Consumers in the Classified Marketplace

The classified pages of daily and Sunday newspapers constitute a massive marketplace. Even when Americans aren't actively looking for a car, a job or a home, many try to keep up with ongoing trends in these three vital areas of living:

Percent of Adults Who Try to Keep up with Trends

In car models, prices, etc.	33%
In the job market, salaries, etc.	37%
In real estate, housing prices, etc.	41%

For keeping up with automotive, employment and real estate trends, the main sources of information are the daily and Sunday newspaper, especially the classified pages:

Main Source of Information on Trends

	Automotive	Employment	Real Estate
Classified ads, daily or Sunday newspaper	59%	59%	63%
Friends, relatives, coworkers	17	35	28
Television, TV	18	9	3
Magazines	11	10	5
Weekly newspapers, classified	5	4	7
Radio	2	3	1
Car dealers, lots	12	NA	NA
Union, trade association	NA	6	NA
All other mentions	11	13	20
Base: Those who like to keep up with trends	(382)	(435)	(465)

Source: Response Analysis Corporation, 1986.

Advertising-to-Sales Ratios for Selected Retail Stores and Services (1985)

	Ad Dollars as Percent of Sales
Amusement & recreation services (misc)	4.7%
Apparel & accessories stores	2.5
Auto dealers & gas stations	1.6
Automotive repair & service	3.4
Computer programs & software	2.8
Computer stores	2.9
Data processing services	1.4
Department stores	3.5
Drug & proprietary stores	1.4
Eating places	3.7
Educational services	4.1
Equipment rental & leasing	2.5
Finance services	2.5
Furniture stores	5.8
Grocery stores	1.4
Hospitals	3.2
Hotels, motels	3.5
Household appliance stores	5.7
Jewelry stores	6.2
Lumber & building materials	2.7
Mobile home dealers	1.3
Motion picture theaters	4.1
Personal credit institutions	1.6
Personal services	7.5
Photofinishing laboratories	4.7
Radio & TV broadcasters	3.8
Radio, TV & music stores	4.6
Shoe stores	2.2
Variety stores	2.4
Women's ready to wear	2.9

Source: Pansophic Systems, Inc, as reported in Advertising Age, September 15, 1986.

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THE HOME IMPROVEMENT MARKET

Consumer Experiences and Expectations

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921 5080

THE HOME IMPROVEMENT MARKET:

Consumer Experiences and Expectations

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper business and its advertisers.

The study was directed and the report written by Nicolas A. Bloom and Albert E. Gollin of the Research Department.

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July 1987

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HIGHLIGHTS

A nationwide survey of American adults in May 1987 on home improvement activities and plans revealed the following:

1. Three-tenths (29%) of American households undertook a home improvement project in the past 12 months and 27 percent plan to do a project within the next 12 months. Thirteen percent of all households both did some home improvement work in the past year and plan a project for the next year.

2. The prime newspaper reading audience segments -- people between the ages of 35 and 49, with $30,000-plus incomes, in households with two or more workers, and homeowners -- were all more likely to have done a home improvement project within the past 12 months and to plan to undertake this work in the next year.

3. One-third (36%) of those who engaged in home improvement projects in the past year did general projects, such as a major remodeling, and three-fourths (75%) did partial projects. Three-fifths (62%) of people who undertook home improvements in the past year did the work themselves, and 24 percent hired a contractor. Some did both, depending upon the scope of the project.

4. About one-fourth (24%) of households which did home improvement projects in the past year spent under $500, or between $500 and $2,499 (28%) in total. An additional 36 percent spent $2,500 or more. Those who undertook partial projects or who did some of the work themselves spent less than those who did general projects or who hired a contractor.

5. Forty percent of people planning a home improvement project in the next 12 months expect to do a general project, and 70 percent expect to undertake a partial project. Plans for do-it-yourself projects and for hiring a contractor are comparable to the practices with respect to the past year's home improvement projects.

6. One-fifth (22%) of the people planning home improvement projects during the next 12 months expect to spend under $500, and 30 percent plan to spend between $500 and $2,499 in total. An additional 31 percent expect to spend $2,500 or more. People expect to spend more for general projects involving contractors than they expect to spend for smaller-scale do-it-yourself projects.

7. People who did home improvement projects and those who plan to undertake them both rated good service in general, good prices every day, helpful sales people, and a large variety and selection of products as the four most important reasons for deciding where to shop for home improvement products.

8. Those who did home improvement projects in the past year and people who plan to do them in the next year rated newspaper ads run by local stores as the single most useful source of information about home improvement products. Those who undertook do-it-yourself projects were more likely than people who hired a contractor to say that newspaper ads were a very useful source of information on home improvement products.

9. Newspapers are a constant element in the lives of active shoppers for home improvement products. People who had done some project in the past year, particularly those who spent $500-plus in total, were more likely to be frequent daily newspaper readers and Sunday paper readers.

SECTION ONE - THE HOME IMPROVEMENT MARKET

In 1986, Americans spent $95.4 billion dollars on home improvement projects. The estimate for 1987 is $102.6 billion, an 8 percent increase (Source: Building Supply Home Centers, May 1987).

Clearly, this is a huge market. The home improvement market consists of many millions of decisions: deciding to do a home improvement project; choosing sources of information about projects, stores, and products; selecting the types and brands of products; where to shop; and where to buy the necessary products or services. This report seeks to define aspects of this market by drawing upon the experiences and expectations of consumers.

The findings in this report come from a survey conducted in May 1987 with 1,019 adults, who were sampled in R. H. Bruskin's weekly OmniTel survey. All respondents were asked about their past year's activities, plans for home improvement projects, attitudes toward various shopping outlets, and sources of information.

Three-tenths (29%) of American households did at least one home improvement project in the past year, one-fourth (27%) expect to undertake such projects in the next 12 months, and 9 percent plan to do some home improvement work, although not in the next year (see Table 1.1). (Respondents could be classified into more than one of the above responses.) The remaining one-half (50%) of all households have no current plans for improving their homes.

As expected, upper-income ($30,000+) respondents were more likely than their counterparts to have done some home improvement projects in the past 12 months and to plan to do some of this work in the upcoming 12 months.* Homeowners, adults between the ages of 35 and 49, and residents of the west were also more likely than others to have done a home improvement project and to expect to undertake one in the next 12 months. People in one-person households and the unemployed were less likely to have undertaken projects in the past year and to be planning them for the next 12 months.

Those who read a Sunday paper (33%) and frequent weekday paper readers (31%) were both more likely than infrequent weekday readers (27%) to have undertaken home improvement activities in the past 12 months.

---

* See Appendix Table A.1 for respondent bases and Appendix Table A.2 for demographic profiles of those who did projects or planned to do them.

Table 1.1

HOME IMPROVEMENT PROJECTS UNDERTAKEN OR PLANNED AMONG DEMOGRAPHIC GROUPS

	Done-Past 12 Months	Planned-Next 12 Months	Planned-More Than 12 Months	No Plans	DK/NA
Total	29%	27%	9%	50%	3%
By Income					
Under $15,000	14%	10%	4%	76%	3%
$15,000-$19,999	27	28	6	51	1
$20,000-$29,999	27	29	12	48	4
$30,000-$39,999	40	42	11	38	3
$40,000+	45	37	11	32	2
By Age					
18-24	26	26	8	52	3
25-34	33	33	13	42	5
35-49	38	39	12	34	4
50-64	33	25	6	51	1
65+	14	7	2	78	3
By Sex					
Male	30	29	9	48	3
Female	29	25	9	51	3
By Region					
Northeast	29	28	10	50	3
North central	28	28	8	50	4
South	28	23	7	54	5
West	34	33	12	43	1
By Home Ownership					
Own	35	31	10	42	3
Rent	16	18	6	68	4
By Household Size					
One	14	14	5	68	2
Two	31	22	8	54	1
Three	31	35	8	42	5
Four or more	36	36	13	36	3
By Number Working					
None	18	12	4	69	3
One	29	27	9	50	2
Two or more	36	37	12	36	3

(Continued)

Table 1.1

HOME IMPROVEMENT PROJECTS UNDERTAKEN OR PLANNED AMONG DEMOGRAPHIC GROUPS (Continued)

	Done-Past 12 Months	Planned-Next 12 Months	Planned-More Than 12 Months	No Plans	DK/NA
Total	29%	27%	9%	50%	3%
Did Home Improvement Projects In Past 12 Months	100%	44%	13%	-%	-%
DIY only	100	50	14	-	-
Contractor only	100	29	12	-	-
Both	100	39	12	-	-
DIY (Net)	100	48	14	-	-
Contractor (Net)	100	32	12	-	-
Plan Home Improvement Projects For Next 12 Months	47	100	15	-	-
By Newspaper Readership					
Frequent reader*	31	26	9	50	2
Infrequent reader*	27	29	9	50	5
Past Sunday reader	33	29	9	47	3

* Frequent readers are defined as those who read 4 or all 5 Monday-through-Friday editions of a daily newspaper. Infrequent readers are those who read 0 through 3 weekday editions of the daily paper.

Question: "Now, I would like to talk about some of the large and small home improvement projects for homes and apartments. These projects could be as small as replacing a faucet, painting the inside or outside of your home or adding a room to your house. Which one or more of these statements describes home improvement projects around your house?" (STATEMENTS): We undertook home improvment projects in the past 12 months; We're planning to undertake home improvement projects during the next 12 months; We're planning home imrprovement projects for more than 12 months from now; We have no plans for home improvement projects.

Home improvement is a continuous process: paint peels, electrical wiring becomes inadequate, water heaters break down, etc. Projects are also undertaken to restore the home to its accustomed appearance and condition. In addition, people upgrade their homes by major additions and renovations.

One indication that home improvement is, at least in part, a carefully considered, step-by-step process is shown in Table 1.1: nearly one-half (47%) of the households which plan a home improvement project for the next year had already undertaken one in the past year.

This most active home improvement market segment amounted to one-eighth (13%) of all American households (see Table 1.2). Again, upper-income ($30,000+) respondents, those aged 35-49, homeowners, households with three or more members, households with at least two working adults, and residents of the West were all more likely than their counterparts both to have recently done and to be planning home improvement projects for the next 12 months.

Table 1.2

HOME IMPROVEMENT PLANS AND ACTIVITIES: PAST YEAR AND NEXT YEAR

	Plan/ Have Done	Plan/ Have Not Done	Done/ Do Not Plan	Neither Plan Nor Have Done
Total	13%	14%	17%	56%
By Income				
Under $15,000	5%	5%	9%	81%
$15,000-$19,999	8	20	19	54
$20,000-$29,999	13	16	14	57
$30,000-$39,999	24	19	16	42
$40,000+	20	17	25	38
By Age				
18-24	10	16	16	58
25-34	17	16	16	52
35-49	19	20	19	42
50-64	12	13	21	54
65+	2	5	12	81
By Sex				
Male	13	16	16	54
Female	13	13	17	58
By Region				
Northeast	13	15	17	56
North central	13	16	16	56
South	12	12	16	61
West	15	18	19	48
By Home Ownership				
Own	15	16	21	49
Rent	9	10	7	75
By Household Size				
One	4	10	10	76
Two	11	11	19	59
Three	16	18	15	50
Four or more	17	19	19	46
By Number Working				
None	5	7	13	75
One	13	14	16	57
Two or more	17	19	19	45
By Past 12 Months Home Improvement Activities	44	-	56	-
DIY only	50	-	50	-
Contractor only	29	-	71	-
Both	39	-	61	-
DIY (Net)	48	-	52	-
Contractor (Net)	32	-	68	-
Plan Home Improvement Projects For Next 12 Months	47	53	-	-

SECTION TWO - PROJECTS DONE IN THE PAST 12 MONTHS

This section analyzes the home improvement projects done in the past 12 months: the types of projects, whether this work was done by members of the household or by contractors, and how much money was spent in total on these projects.

Respondents who stated that they had done some home improvement work within the past 12 months (29% of all adults) were asked which projects they had done, whether these were do-it-yourself projects or done by a contractor, and how much they had spent on all these projects.

One-third (36%) of all those who had done home improvement projects in the past 12 months did "general" projects, for example, major remodeling or the addition of a room to their residence (see Table 2.1). The general projects most frequently undertaken were adding a deck, patio, or porch (9%), remodeling a bathroom (8%), remodeling the kitchen (6%), and adding a room (5%).

Table 2.1

PROJECTS DONE IN PAST 12 MONTHS

	Total*
Base: Did Projects In Past 12 Months	(312)
General Projects (Net)	36%
Add deck/patio/porch	9
Remodel bathroom	8
Remodel kitchen	6
Add a room	5
Remodel basement	3
Add a bathroom	2
Partial Projects (Net)	75%
Interior painting	19
Exterior painting	11
Wall to wall carpeting/ room sized rugs	9
Painting (not specified)	8
Wall paper/wall coverings	8
Roofing	7
Landscaping	7
Plumbing	6
Windows	5
Doors	5
Complete remodeling/remodel	5
Faucets	5
Wall paneling	4
Refinish floors	4
Outdoor/exterior siding	4
Central heating gas/oil	3
Electrical wiring	3
Don't know/no answer	8

* Note: Multiple responses are possible.

Question: "What home improvement projects were done in the past 12 months?"

Three-fourths (75%) of those who had done home improvement projects in the past year did "partial" projects, which tend to be of more limited scope. One example of a partial project is wall paper or wall coverings. Partial projects can range from an inexpensive replacement of a faucet to relatively expensive projects, such as landscaping.

The most frequently mentioned partial projects were interior painting (19%), exterior painting (11%), wall-to-wall carpeting or room sized rugs (9%), painting in general (8%), and wall paper or wall coverings (8%).

Respondents with household incomes of $30,000-$39,999 (47%), members of three-person households (47%), residents of the Northeast (47%), 35-49 year olds (45%), men (42%), and homeowners (39%) were all more likely than their counterparts to have undertaken general projects in the past 12 months (see Table 2.2).

Women (80%), residents of the Northeast and North Central regions (84% each), members of two-person households (83%) were all more likely to have undertaken partial projects in the past year. Respondents in all income and age groups were about equally likely to have undertaken partial projects.

Table 2.2

PROJECTS UNDERTAKEN IN THE PAST 12 MONTHS AMONG DEMOGRAPHIC GROUPS

		Partial Projects			
			Painting		
	General Projects	Total	Total	Interior	Exterior
Total	36%	75%	35%	19%	11%
By Income					
Under $20,000	16%	75%	38%	16%	13%
$20,000-$29,999	35	76	32	19	8
$30,000-$39,999	47	77	38	20	13
$40,000+	42	73	36	21	14
By Age					
18-24	23	77	34	19	6
25-34	40	78	41	24	11
35-49	45	71	34	17	13
50+	29	74	33	17	13
By Sex					
Male	42	70	37	16	12
Female	30	80	34	22	10
By Region					
Northeast	47	84	32	18	9
North central	29	84	36	20	15
South	31	71	36	21	11
West	40	62	35	18	9
By Home Ownership					
Own	39	75	35	20	13
Rent	15	73	33	17	4
By Household Size					
One	28	68	20	4	10
Two	23	83	35	18	12
Three	47	65	27	19	10
Four or more	43	75	42	25	11
By Number Working					
None	25	79	25	19	6
One	38	77	36	17	11
Two or more	37	72	37	21	13
Plan Home Improvement Projects For Next 12 Months	40	77	32	23	8
By Newspaper Readership					
Frequent reader	32	77	38	20	14
Infrequent reader	42	71	30	19	7
Past Sunday reader	31	78	37	21	13

Base = Undertook home improvement projects in past 12 months.

Painting was the most frequently-done partial project: 35 percent of the households which did any home improvement in the past year painted or stained some part of their residence. Interior painting was done by a higher proportion of respondents than was exterior painting (19% and 11%, respectively). Further details are shown in Table 2.2.

Exterior painting was done by a higher proportion of well-to-do ($30,000+) households, by two-income families, and of course, by homeowners. Since these groups are the prime audience for the daily newspaper, frequent weekday readers were more likely than infrequent readers to have painted the outside of their residences in the past year (14% and 7%, respectively).

Three-fifths (62%) of those who undertook home improvement projects in the past 12 months carried out do-it-yourself (DIY) projects only, one-fourth (24%) had contractors do all the work, and 14 percent both hired a contractor and did some of the work themselves (see Table 2.3). Thus, three-fourths (76%) of the respondents did at least one DIY project and two-fifths (38%) hired a contractor.

As expected, lower-income (under $20,000) households were more likely than their counterparts both to have undertaken DIY projects rather than to have hired a contractor (87% and 23%, respectively). By way of contrast, upper-income ($40,000+) households were disproportionately

Table 2.3

WHO WORKED ON HOME IMPROVEMENT PROJECTS AMONG DEMOGRAPHIC GROUPS

	DIY Only	Con-tractor	Both	Net DIY	Net Con-tractor
Total	62%	24%	14%	76%	38%
By Income					
Under $20,000	77%	13%	9%	87%	23%
$20,000-$29,999	69	15	14	83	29
$30,000-$39,999	68	17	15	83	33
$40,000+	48	35	17	65	52
By Age					
18-24	64	16	19	84	36
25-34	72	18	8	80	27
35-49	69	18	13	82	31
50+	47	35	19	65	54
By Sex					
Male	69	18	13	82	31
Female	55	29	15	70	44
By Region					
Northeast	63	22	15	78	37
North central	55	27	18	74	45
South	63	26	10	73	36
West	67	19	14	81	33
By Home Ownership					
Own	58	26	16	74	42
Rent	82	12	3	85	15
By Household Size					
One	65	31	4	69	35
Two	55	31	14	69	45
Three	65	19	14	79	33
Four or more	65	19	17	82	35
By Number Working					
None	62	30	8	70	38
One	63	25	11	73	36
Two or more	61	21	18	79	39
By Past 12 Months DIY Activity					
DIY (Net)	82	-	19	100	19
Contractor (Net)	-	63	37	37	100
By Newspaper Readership					
Frequent reader	53	29	18	71	46
Infrequent reader	78	15	8	85	23
Past Sunday reader	58	25	16	75	41

Question: "Did you or other members of your household do this work yourselves or did you hire a contractor to do it for you?"

likely (52%) to have hired contractors to do at least some of their home improvement projects.

Two demographic groups which are more likely to have lower household incomes--younger (18-24) respondents and renters--were also more likely to undertake do-it-yourself projects (84% and 85%, respectively) and less likely to hire contractors (36% and 15%, respectively). Men (82%) and residents of the West (81%) were also more likely to have been involved in do-it-yourself home improvement projects in the past 12 months.

About one-fourth of those who undertook home improvement projects in the past year spent less than $500 (24%), or between $500 and $2,499 (28%) in total (see Table 2.4). Approximately equal proportions of households spent $2,500-$4,999 (17%) or $5,000-plus (19%). (The remainder didn't answer this question.)

Not surprisingly, available income strongly affects the amount of money spent on home improvement projects. One-third (32%) of households with incomes in excess of $40,000 spent at least $5,000. Conversely, one-half (54%) of households with incomes under $20,000 spent $500 or less on home improvement projects in the last 12 months. Older (50+) respondents and homeowners were correlatively more likely to spend more on home improvements.

Table 2.4

AMOUNT SPENT ON ALL HOME IMPROVEMENT PROJECTS IN THE PAST 12 MONTHS

	Under $500	$500-$2499	$2500-$4999	$5000+	DK/NA
Total	24%	28%	17%	19%	12%
By Income					
Under $20,000	54%	22%	9%	7%	7%
$20,000-$29,999	21	36	18	11	14
$30,000-$39,999	20	27	24	19	10
$40,000+	15	27	17	32	9
By Age					
18-24	38	25	7	17	14
25-34	27	34	13	20	6
35-49	24	31	21	12	12
50+	15	21	21	24	19
By Sex					
Male	23	28	24	20	5
Female	26	27	10	18	19
By Region					
Northeast	23	20	17	23	17
North central	28	30	20	18	4
South	24	35	15	12	15
West	22	24	15	26	13
By Home Ownership					
Own	19	29	19	21	11
Rent	53	21	1	7	18
By Household Size					
One	32	24	6	23	15
Two	24	26	14	23	12
Three	20	26	20	14	20
Four or more	25	31	19	18	8
By Number Working					
None	30	19	17	13	21
One	28	29	14	16	13
Two or more	20	30	19	23	9
By Newspaper Readership					
Frequent reader	19	32	20	20	9
Infrequent reader	33	21	11	17	19
Past Sunday reader	22	31	18	21	9

Question: "Just making a rough guess, about how much money did you spend on all these home improvement projects in the past 12 months?"

Two-thirds (68%) of those who did general projects in the past year did all their projects on a do-it-yourself basis; the comparable figure for partial projects was 61 percent (see Table 2.5).

Table 2.5

DO-IT-YOURSELF ACTIVITY IN PAST 12 MONTHS
BY PROJECT TYPE

			Partial Projects		
				Painting	
	Total	General Projects	Total	Total	Interior
Base: Did Projects In Past 12 Months	(312)	(114)	(234)	(110)	(59)
DIY only	62%	68%	61%	66%	70%
Contractor only	24	18	24	13	13
Both	14	15	15	21	17
DIY (Net)	76%	82%	76%	87%	87%
Contractor (Net)	38	33	39	34	30

General projects usually cost more than partial projects. Households that did general projects were more likely than those doing partial projects to have spent at least $5,000 on their residences last year (28% vs. 16%, respectively). The former were also less likely to have limited their expenditures to under $500 (see Table 2.6).

Painting was a relatively inexpensive partial project: one-third (35%) of the households that painted in the past 12 months spent under $500 in total on their home improvements.

Table 2.6

TOTAL AMOUNT SPENT ON PROJECTS IN PAST 12 MONTHS
BY PROJECT TYPE

			Partial Projects		
		General		Painting	
	Total	Projects	Total	Total	Interior
Base: Did Projects In Past 12 Months	(312)	(114)	(234)	(110)	(59)
Under $500 (Net)	24%	15%	28%	35%	35%
Under $100	7	6	8	8	10
$100-$249	10	4	11	16	14
$250-$499	7	5	9	12	11
$500-$2,499 (Net)	28	22	27	26	24
$500-$999	11	8	10	10	5
$1,000-$2,499	17	15	17	16	19
$2,500-$4,999	17	24	17	20	18
$5,000+ (Net)	19	28	16	11	14
$5,000-$9,999	7	6	7	6	6
$10,000+	12	22	8	5	8
Don't know/no answer	12	11	12	8	10
	100%	100%	100%	100%	101%

Table 2.7 presents data on spending for home improvement as a function of do-it-yourself activity. As expected, people who undertook only DIY projects were more likely than people who hired contractors to have limited their home improvement expenditures to under $500 (35% vs. 9%). By way of contrast, one-third (31%) of the households that only hired contractors spent at least $5,000 on their projects in the past year.

Table 2.7

TOTAL AMOUNT SPENT ON PROJECTS IN PAST 12 MONTHS
BY DO-IT-YOURSELF ACTIVITY

	DIY Only	Contractor Only	Both	Net DIY	Net Contractor
Base: Did Projects In Past 12 Months	(189)	(77)	(45)	(234)	(122)
Under $500 (Net)	35%	9%	3%	29%	6%
Under $100	11	4	-	8	2
$100-$249	15	2	-	12	2
$250-$499	10	3	3	9	3
$500-$2,499 (Net)	27	24	41	29	31
$5900-$999	13	7	10	13	8
$1,000-$2,499	14	17	31	17	23
$2,500-$4,999	14	20	24	16	22
$5,000+ (Net)	13	31	25	15	29
$5,000-$9,999	5	10	15	7	12
$10,000+	9	21	10	9	17
Don't know/no response	11	16	8	11	13

SECTION THREE - PROJECTS PLANNED FOR THE NEXT 12 MONTHS

This section analyzes data on home improvement projects planned for the coming year. As with projects done in the past 12 months, those who said that they expect to undertake home improvement projects in the next 12 months were asked which projects they plan to do, whether these would be do-it-yourself projects or done by contractors, and how much they expected to spend on all these projects.

Two-fifths (40%) of the respondents who expect to undertake home improvement projects in the next 12 months were planning "general" projects (see Table 3.1). Four types of home improvements -- adding a desk, patio, or porch, remodeling the bathroom, remodeling the kitchen, and adding a room -- were the ones most frequently mentioned (8% each).

Over two-thirds (70%) of those planning projects expect to do "partial" projects. The most likely projects were interior painting (16%), exterior painting (13%), painting in general (8%), landscaping (8%), and wall-to-wall carpeting or room-sized rugs (7%).

Table 3.1

PROJECTS PLANNED FOR THE NEXT 12 MONTHS

	Total*
Base: Plan Projects For Next 12 Months	(284)
General Projects (Net)	40%
Add deck/patio/porch	8
Remodel bathroom	8
Remodel kitchen	8
Add a room	8
Remodel basement	3
Add a bathroom	2
Add garage	2
Partial Projects (Net)	70%
Interior painting	16
Exterior painting	13
Painting (not specified)	8
Landscaping	8
Wall to wall carpeting/ room sized rugs	7
Wall paper/wall coverings	6
Roofing	6
Plumbing	4
Windows	4
Refinish floors	4
Complete remodeling/remodel	3
Faucets	3
Electrical wiring	3
Outdoor/exterior siding	3
Driveway/paving	3
Don't know/no answer	10

* Note: Multiple responses are possible.

Question: "What projects do you expect to do in the next 12 months?"

The demographics of those planning general projects were similar to those who did projects in the past 12 months: upper-income ($30,000-$39,999) respondents, 25-49 year olds, members of larger (4+) households, and residents of the Northeast were all more likely than their counterparts to be planning general projects (see Table 3.2).

Respondents 50 years of age and older were more likely to be planning a partial project and less likely to plan a general project in the next 12 months than were the younger age groups. Expectations of doing at least one partial project were greatest among lower-income (under $20,000) and one-person households.

One-third (34%) of respondents who expect to undertake any home improvement projects in the next 12 months plan to paint. They are almost evenly divided between interior and exterior painting projects (16% and 13%, respectively).

Women, lower-income (under $20,000) respondents, and renters were disproportionately likely to plan interior painting. Since members of these groups are less likely than their counterparts to be frequent readers of a daily newspaper, infrequent readers are more likely than frequent readers to expect to do interior painting in the next year (21% and 12%, respectively).

Table 3.2

PROJECTS PLANNED FOR THE NEXT 12 MONTHS AMONG DEMOGRAPHIC GROUPS

	General Projects	Partial Projects			
		Total	Painting		
			Total	Interior	Exterior
Total	40%	70%	34%	16%	13%
By Income					
Under $20,000	24%	78%	42%	24%	12%
$20,000-$29,999	32	76	32	17	15
$30,000-$39,999	48	70	37	17	17
$40,000+	45	66	29	10	11
By Age					
18-24	26	73	38	17	16
25-34	48	62	33	17	7
35-49	45	70	31	13	12
50+	29	78	37	17	20
By Sex					
Male	39	71	31	9	13
Female	41	69	36	23	13
By Region					
Northeast	46	70	25	18	2
North central	39	74	40	20	20
South	36	67	33	7	15
West	40	69	35	20	13
By Home Ownership					
Own	44	69	30	13	14
Rent	23	74	51	27	10
By Household Size					
One	41	78	46	17	10
Two	30	75	39	20	18
Three	37	77	36	17	16
Four or more	47	61	26	11	10
By Number Working					
None	23	82	37	24	17
One	36	76	41	19	13
Two or more	46	64	28	12	13
By Newspaper Readership					
Frequent reader	38	72	30	12	13
Infrequent reader	42	68	39	21	14
Past Sunday reader	41	73	37	17	15

Base = Plan to undertake home improvement projects in the next 12 months.

Two-thirds (66%) of the households planning home improvement projects for the next 12 months expect to undertake only do-it-yourself projects, one-fourth (23%) plan to hire contractors to do all the work, and 9 percent stated that they will hire contractors and undertake some of the work themselves (see Table 3.3). Thus, three-fourths (74%) of those planning home improvement projects expect to undertake DIY projects and one-third (32%) will hire a contractor.

The demographics of those planning do-it-yourself projects vs. hiring of contractors is quite similar to that for those who did a project in the past year. Men (71%), those below age 35 (73%), renters (76%), larger households (74%), two-income households (72%), and those with household incomes under $20,000 (73%) were all more likely to be planning only do-it-yourself projects and less likely to hire a contractor.

One-fifth (22%) of those planning home improvement projects for the next 12 months expect to spend under $500 and 30 percent plan to spend between $500 and $2,499 (see Table 3.4). An additional 11 percent expect to spend $2,500-$4,999 or $5,000-plus (20%). One-sixth (17%) were unable to estimate their expenditures for home improvement projects in the next year.

Table 3.3

WHO PLANS TO WORK ON HOME IMPROVEMENT PROJECTS AMONG DEMOGRAPHIC GROUPS

	DIY Only	Contractor	Both	Net DIY	Net Contractor
Total	66%	23%	9%	74%	32%
By Income					
Under $20,000	73%	16%	8%	82%	24%
$20,000-$29,999	64	28	8	72	36
$30,000-$39,999	82	13	5	87	18
$40,000+	57	24	14	70	38
By Age					
18-24	75	14	7	81	20
25-34	71	16	11	81	27
35-49	66	26	7	74	33
50+	56	32	10	66	42
By Sex					
Male	71	21	6	76	27
Female	60	25	12	72	37
By Region					
Northeast	63	35	2	65	37
North central	63	23	12	75	35
South	67	20	9	76	28
West	70	17	12	82	28
By Home Ownership					
Own	63	26	9	73	35
Rent	76	12	5	82	17
By Household Size					
One	64	28	5	69	32
Two	57	31	10	68	41
Three	62	29	7	69	36
Four or more	74	14	10	83	24
By Number Working					
None	55	34	12	67	46
One	60	29	9	68	37
Two or more	72	18	8	80	26
By Newspaper Readership					
Frequent reader	63	27	9	72	36
Infrequent reader	70	19	8	78	27
Past Sunday reader	67	22	9	76	31

Question: "Do you or other members of your household plan to do this work yourselves or do you plan to hire a contractor to do it for you?"

Table 3.4

AMOUNT PLAN TO SPEND ON ALL HOME IMPROVEMENT PROJECTS IN THE NEXT 12 MONTHS

	Under $500	$500-$2499	$2500-$4999	$5000+	DK/NA
Total	22%	30%	11%	20%	17%
By Income					
Under $20,000	35%	27%	6%	14%	18%
$20,000-$29,999	20	40	9	13	18
$30,000-$39,999	30	32	4	21	14
$40,000+	15	23	19	30	14
By Age					
18-24	34	12	12	13	29
25-34	19	36	6	22	17
35-49	21	31	12	21	16
50+	19	35	10	24	12
By Sex					
Male	26	25	15	22	12
Female	17	35	6	19	23
By Region					
Northeast	19	17	10	31	23
North central	27	35	8	17	13
South	22	32	13	16	17
West	19	34	9	20	17
By Home Ownership					
Own	18	32	12	23	16
Rent	39	22	6	8	25
By Household Size					
One	33	29	5	16	17
Two	20	27	14	20	19
Three	18	33	9	23	18
Four or more	23	30	10	21	16
By Number Working					
None	37	27	6	21	10
One	21	29	11	23	16
Two or more	20	32	11	18	20
By Planned DIY Activity					
DIY (Net)	28	32	8	18	15
Contractor (Net)	4	27	19	33	17
By Newspaper Readership					
Frequent reader	21	32	12	22	13
Infrequent reader	22	28	9	18	23
Past Sunday reader	23	29	11	20	17

Question: "Just making a rough guess, about how much money do you plan to spend on these projects, in total?"

As expected, income levels affect planned expenditures for home improvement projects. Upper-income ($40,000+) respondents show the highest proportion of "$5,000+" and the lowest percentage of "under $500" answers (30% and 15%, respectively). Homeowners (23%), residents of the Northeast (31%), and those who expect to hire contractors (33%) were also more likely than their counterparts to estimate home improvement costs in excess of $5,000.

Similar proportions of people planning general projects (69%) and partial projects (65%) expect to do all their own work on home improvement projects in the upcoming 12 months (see Table 3.5). Three-fourths (73%) of those planning to paint expect their home improvement activities to be DIY projects. Interior painting was particularly likely (80%) to be a DIY undertaking.

General projects were estimated to cost more than partial projects: one-third (33%) of those planning general projects, but only one-sixth (16%) of those planning partial projects, expected total home improvement expenditures in the next 12 months to exceed $5,000 (see Table 3.6). Painting (particularly interior painting) was expected to be a relatively inexpensive project. And as was true of projects completed in the past year, do-it-yourself projects are expected to be less costly than those involving a contractor (see Table 3.7).

Table 3.5

DO-IT-YOURSELF ACTIVITY PLANNED FOR THE NEXT 12 MONTHS BY PROJECT TYPE

			Partial Projects		
				Painting	
	Total	General Projects	Total	Total	Interior
Base: Plan Projects For Next 12 Months	(284)	(114)	(199)	(97)	(42)
DIY only	66%	69%	65%	73%	80%
Contractor only	23	22	23	17	16
Both	9	8	11	10	4
DIY (Net)	74%	77%	75%	82%	84%
Contractor (Net)	32	30	34	26	20

Table 3.6

TOTAL AMOUNT PLANNED FOR PROJECTS IN THE NEXT 12 MONTHS BY PROJECT TYPE

			Partial Projects		
				Painting	
	Total	General Projects	Total	Total	Interior
Base: Plan Projects For Next 12 Months	(284)	(114)	(199)	(97)	(42)
Under $500 (Net)	22%	10%	24%	32%	31%
Under $100	5	-	5	7	6
$100-$249	7	2	8	9	16
$250-$499	10	8	11	15	9
$500-$2,499 (Net)	30	30	33	30	35
$500-$999	15	14	19	24	31
$1,000-$2,499	15	16	14	6	5
$2,500-$4,999	11	8	12	11	6
$5,000+ (Net)	20	33	16	13	9
$5,000-$9,999	10	16	8	4	-
$10,000+	10	17	8	9	9
Don't know/no answer	17	19	15	14	18
	100%	100%	100%	100%	99%

Table 3.7

TOTAL AMOUNT PLANNED FOR PROJECTS IN THE NEXT 12 MONTHS BY PLANNED DO-IT-YOURSELF ACTIVITY

	DIY Only	Contractor Only	Net DIY	Net Contractor
Base: Plan Projects For Next 12 Months	(187)	(65)	(213)	(91)
Under $500 (Net)	31%	4%	28%	4%
Under $100	7	-	6	-
$100-$249	10	2	9	1
$250-$499	14	2	13	2
$500-$2,499 (Net)	32	27	32	27
$500-$999	16	16	15	14
$1,000-$2,499	16	11	17	14
$2,500-$4,999	6	17	8	19
$5,000+ (Net)	15	32	18	33
$5,000-$9,999	8	11	10	14
$10,000+	6	20	7	19
Don't know/no response	16	21	14	16

SECTION FOUR - ATTITUDES TOWARD HOME IMPROVEMENT SHOPPING

This section analyzes the importance to consumers of certain attributes of home shopping centers and stores and the usefulness of five sources of information about home improvement products.

Importance Of Store Attributes

The most important attribute of a home improvement product store is "good service in general" -- 76 percent of adults rated this characteristic as "very important" in deciding where to shop for these products (see Table 4.1). Three other attributes -- "has good prices every day " (72% answering "very important"), "has helpful sales people (70%), and "has a large variety and selection of products (69%) -- were also rated as very important by high proportions of shoppers.

The three least significant influences on shopping decisions were "offers their own credit card" (11%), "is part of a store/mall where I can shop for other things at the same time" (25%), and "gives me good ideas for new projects" (31%).

Table 4.1

IMPORTANCE OF STORE ATTRIBUTES

	Very Important	Somewhat Important	Not Too Important	Not At All Important	DK/NA
Has good service in general	76%	19%	2%	2%	1%
Has good prices every day	72	20	4	2	2
Has helpful sales people	70	21	4	3	2
Has a large variety and selection of products	69	22	5	2	2
Is easy to get to	58	29	8	3	2
Has good special sales	53	30	11	4	2
Is a pleasant shopping experience	48	32	11	6	4
Gives me good ideas for new projects	31	32	19	14	4
Is part of a store/mall where I can shop for other things at the same time	25	27	27	18	2
Offers their own credit card	11	13	27	47	2

Question: "People shop for home improvement products at different kinds of stores. Please tell me how important each of these is to you, when you decide to shop for such products. Is it very important, somewhat important, not too important, or not at all important?"

People who had done home improvement projects during the past year were about as likely as others to rate good service, good prices, helpful sales people, and variety/selection as "very important" in deciding where to shop for home improvement products (see Table 4.2). There were only minor variations in the proportions rating these four characteristics as "very important" among people who undertook general vs. partial projects, did the work themselves vs. hired a contractor, and who spent different amounts on home improvement projects in the past 12 months.

People planning to undertake home improvement projects in the next 12 months also considered good service, good prices, helpful sales people, and variety/selection as the four most important attributes of stores selling home improvement products. People who plan to spend $2,500-plus (63%) were less likely than those who plan to spend $500-$2,499 (82%) or under $500 (78%) to consider a store's having helpful sales people to be "very important."

The consistency with which consumers of all types -- those who have recently been active and those who plan to be, as well as others who haven't done home improvements -- suggests that these are store and shopping benefits that are generally valued as more or less important when it comes to home improvement purchases.

Table 4.2

IMPORTANCE OF STORE ATTRIBUTES BY HOME IMPROVEMENT PLANS/ACTIVITIES
(Proportion Answering "Very Important")

	Good Service	Good Prices	Helpful Sales People	Variety/ Selection	Easy To Get To
Total	76%	72%	70%	69%	58%
By Past 12 Months Home Improvement Activities	80%	78%	74%	75%	56%
By Project Type					
General	78	80	67	74	53
Partial	82	76	75	74	56
By DIY Activity					
DIY only	79	81	72	78	57
Contractor only	78	74	75	69	58
DIY (Net)	81	78	74	77	55
Contractor (Net)	83	72	77	70	53
By Amount Spent					
Under $500	78	83	73	72	53
$500-$2,499	79	75	77	77	61
$2,500-$4,999	77	73	66	78	58
$5,000+	84	76	73	73	47
By Next 12 Months Plans For Home Improvement Projects	81	75	75	70	57
By Project Type					
General	79	73	75	70	53
Partial	82	74	76	69	55
By Planned DIY Activity					
DIY (Net)	82	74	74	73	58
Contractor (Net)	75	75	75	60	53
By Amount Plan To Spend					
Under $500	86	75	78	77	54
$500-$2,499	82	79	82	71	57
$2,500+	76	70	63	64	55

(Continued)

"Good Service" : Has good service in general.
"Good Prices" : Has good prices every day.
"Helpful Sales People": Has helpful sales people.
"Variety/Selection" : Has a large variety and selection of products.
"Easy To Get To" : Is easy to get to.

Table 4.2

IMPORTANCE OF STORE ATTRIBUTES BY HOME IMPROVEMENT PLANS/ACTIVITIES (Proportion Answering "Very Important") (Continued)

	Special Sales	Pleasant Shopping	Good Ideas	Store/ Mall	Credit Card
Total	53%	48%	31%	25%	11%
By Past 12 Months Home Improvement Activities	53%	47%	33%	20%	8%
By Project Type					
General	49	37	37	20	5
Partial	52	47	32	17	8
By DIY Activity					
DIY only	60	42	33	20	8
Contractor only	43	55	37	23	12
DIY (Net)	56	44	32	18	7
Contractor (Net)	41	54	33	18	8
By Amount Spent					
Under $500	60	45	27	22	13
$500-$2,499	52	44	31	17	7
$2,500-$4,999	45	43	33	15	7
$5,000+	48	52	41	18	6
By Next 12 Months Plans For Home Improvement Projects	53	48	36	17	11
By Project Type					
General	55	48	33	15	9
Partial	51	47	38	18	10
By Planned DIY Activity					
DIY (Net)	55	50	38	18	9
Contractor (Net)	45	39	30	14	14
By Amount Plan To Spend					
Under $500	42	56	35	17	7
$500-$2,499	56	47	37	20	8
$2,500+	51	43	31	14	12

"Special Sales" : Has good special sales.
"Pleasant Shopping": Is a pleasant shopping experience.
"Good Ideas" : Gives me good ideas for news projects.
"Store/Mall" : Is part of a store/mall where I can shop for other things at the same time.
"Credit Card" : Offers their own credit card.

Usefulness of Information Sources

Newspaper ads and home columns and features provide significant assistance to consumers. In fact, more people (40%) rated newspaper ads as a "very useful" source of information when they are thinking of buying home improvement products than any other source (see Table 4.3). Trailing newspaper ads in perceived usefulness were consumer guides (36%), advice from friends/relatives/neighbors (34%), and home columns in the local daily newspaper (24%). Mail advertising (19%) was least often seen as a very useful information source.

People who engaged in home improvement activities in the past year and those who plan a project for the next 12 months rated newspaper ads as the most useful source of shopping information -- 41% and 40%, respectively, said this source of information was "very useful" (see Table 4.4).

Those who undertook do-it-yourself projects were much more likely than those who hired contractors to rate newspaper ads as "very useful" (43% vs. 32%). People planning DIY projects were also much more likely than those planning to hire a contractor to say that newspaper ads were "very useful" (46% vs. 26%). Thus, for the largest proportion of active consumers, the newspaper is their prime shopping guide.

Table 4.3

USEFULNESS OF INFORMATION SOURCES

	Very Useful	Somewhat Useful	Not Too Useful	Not At All Useful	DK/NA
Newspaper ads run by local stores	40%	45%	8%	6%	1%
Consumer guides or reports on products	36	35	13	14	2
Advice from friends, relatives or neighbors	34	45	11	[illegible]	2
Home columns or features in the local daily paper	24	45	16	13	2
Advertisements mailed to home	19	37	21	21	2

Question: "When you are thinking about buying home improvement products, how useful are the following sources of information? Would you say (SOURCE) is very useful, somewhat useful, not too useful, or not at all useful?"

Table 4.4

USEFULNESS OF INFORMATION SOURCES AMONG DEMOGRAPHIC GROUPS
(Proportion Answering "Very Useful")

	Newspaper Ads	Consumer Guides	Advice	Home Columns	Mail Ads
Total	40%	36%	34%	24%	19%
By Income					
Under $15,000	42%	41%	41	26%	22%
$15,000-$19,999	45	38	40	30	24
$20,000-$29,999	46	40	34	27	24
$30,000-$39,999	39	31	27	28	20
$40,000+	29	34	33	15	13
By Age					
18-24	32	31	34	19	20
25-34	37	36	32	21	28
35-49	40	39	34	23	23
50-64	42	33	36	29	11
65+	51	41	33	30	10
By Sex					
Male	37	33	34	20	20
Female	43	39	33	28	19
By Region					
Northeast	40	41	34	23	21
North central	37	33	30	23	15
South	43	36	36	25	22
West	38	34	34	27	19
By Home Ownership					
Own	40	36	34	23	18
Rent	41	36	33	28	23
By Household Size					
One	42	37	39	28	14
Two	40	37	31	26	17
Three	39	41	36	23	24
Four or more	39	31	32	22	22
By Number Working					
None	47	37	38	28	13
One	36	38	32	24	22
Two or more	39	33	33	22	21

(Continued)

Table 4.4

USEFULNESS OF INFORMATION SOURCES AMONG DEMOGRAPHIC GROUPS

(Proportion Answering "Very Useful")
(Continued)

	Newspaper Ads	Consumer Guides	Advice	Home Columns	Mail Ads
Total	40%	36%	34%	24%	19%
By Past 12 Months Home Improvement Activities	41%	33%	31%	22%	19%
By Project Type					
General	35	31	27	20	23
Partial	40	31	33	23	16
By DIY Activity					
DIY only	47	31	32	22	23
Contractor only	34	37	25	26	13
DIY (Net)	43	31	33	21	20
Contractor (Net)	32	34	30	22	12
By Amount Spent					
Under $500	46	29	34	23	20
$500-$2,499	38	28	30	21	18
$2,500-$4,999	48	40	35	22	25
$5,000+	33	37	26	21	19
By Next 12 Months Plans For Home Improvement Projects	40	36	32	25	21
By Project Type					
General	31	34	31	18	22
Partial	41	37	33	27	20
By Planned DIY Activity					
DIY (Net)	46	35	31	25	22
Contractor (Net)	26	38	36	19	22
By Amount Plan To Spend					
Under $500	56	39	35	31	11
$500-$2,499	45	33	29	20	27
$2,500+	27	38	33	21	23

SECTION FIVE - NEWSPAPER READERSHIP

Overall, three-fifths (60%) of American adults were frequent daily newspaper readers and two-thirds (66%) read last Sunday's paper (see Table 5.1).

Consistent with the findings of previous NAB readership studies,* upper-income ($30,000+) respondents, people 35 and older, homeowners, and residents of the Northeast were all more likely to be frequent daily newspaper readers. People 35 and older, with household incomes of $30,000-plus, and homeowners were also more likely to have read last Sunday's paper.

Adults who did some home improvement work, particularly those who spent $500-plus, were more likely to be frequent daily newspaper readers. Sunday readership is particularly strong among past or prospective consumers. Those who plan to spend less on a home improvement project in the next 12 months were only slightly less likely than others to be frequent daily newspaper readers. The more people plan to spend, the greater their involvement with the daily newspaper.

---

* See "Newspapers In American News Habits: A Comparative Assessment," (Newspaper Advertising Bureau, 1985).

Table 5.1

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS

	Frequent Readers*	Infrequent Readers*	Past Sunday Readers
Total	60%	40%	66%
By Income			
Under $15,000	50%	50%	60%
$15,000-$19,999	52	48	60
$20,000-$29,999	59	41	66
$30,000-$39,999	64	36	82
$40,000+	74	26	75
By Age			
18-24	39	61	61
25-34	49	51	64
35-49	65	35	68
50-64	71	29	68
65+	78	22	71
By Sex			
Male	62	38	65
Female	58	42	68
By Region			
Northeast	66	34	69
North central	62	38	69
South	57	43	67
West	56	44	60
By Home Ownership			
Own	68	32	69
Rent	41	59	60
By Household Size			
One	61	39	67
Two	69	31	71
Three	54	46	60
Four or more	55	45	66
By Number Working			
None	66	34	69
One	58	42	65
Two or more	59	41	66

(Continued)

Table 5.1

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS
(Continued)

Total	Frequent Readers* 60%	Infrequent Readers* 40%	Past Sunday Readers 66%
By Past 12 Month Home Improvement Activities	64%	36%	74%
By Project Type			
General	57	43	65
Partial	65	35	77
By Amount Spent			
Under $500	51	49	66
$500-$2,499	73	27	82
$2,500-$4,999	77	23	78
$5,000+	67	33	80
By Next 12 Months Plans For Home Improvement Projects	57	43	70
By Project Type			
General	55	45	72
Partial	59	41	72
By Amount Plan To Spend			
Under $500	57	43	72
$500-$2,499	60	40	68
$2,500+	63	37	71

* Frequent readers are defined as those who read 4 or all 5 Monday-through-Friday editions of a daily newspaper. Infrequent readers are those who read 0 through 3 weekday editions of the daily paper.

Questions: "Please tell me whether or not you, yourself, have read or looked at a daily newspaper during each of the last seven days. Let's start with a week ago today, that is, last (DAY OF INTERVIEW). (IF SUNDAY INTERVIEW, LET'S START WITH LAST MONDAY.) Did you read a daily paper on (INSERT EACH DAY OF THE WEEK)?"

"Did you, yourself, read or look at any part of last Sunday's paper?" (IF SUNDAY INTERVIEW: "Today's paper?")

APPENDIX TABLES

Table A.1

RESPONDENT BASES
(Unweighted)

Total	Total (1019)	Did Projects (312)	Plan Projects (284)
By Income			
Under $15,000	163	24	18
$15,000-$19,999	113	30	33
$20,000-$24,999	126	32	41
$25,000-$29,999	109	34	30
$30,000-$39,999	142	55	57
$40,000-$49,999	90	42	31
$50,000-$74,999	95	45	41
$75,000+	45	19	10
No answer	136	31	23
By Age			
18-20	66	18	15
21-24	98	27	27
25-29	139	36	37
30-34	154	57	56
35-39	117	50	48
40-44	88	28	34
45-49	48	17	13
50-54	54	21	16
55-59	61	23	16
60-64	61	16	10
65+	111	17	9
No answer	22	2	3
By Sex			
Male	513	153	149
Female	506	159	135
By Region			
Northeast	212	65	54
North central	274	82	79
South	354	106	88
West	179	59	63
By Home Ownership			
Own	725	270	232
Rent	282	41	52
No answer	12	1	0

(Continued)

Table A.1

RESPONDENT BASES
(Unweighted)
(Continued)

Total	Total (1019)	Did Projects (312)	Plan Projects (284)
By Household Size			
One	167	28	28
Two	296	92	70
Three	208	65	69
Four	192	75	63
Five	94	32	32
Six or more	62	20	22
By Number Working			
None	192	36	26
One	374	110	98
Two	342	129	126
Three or more	111	37	34
By Past 12 Months DIY Activity			
DIY only		189	
Contractor only		77	
Both		45	
DIY (Net)		234	
Contractor (Net)		122	
By Amount Spent			
Under $100		22	
$100-$249		28	
$250-$499		23	
$500-$999		34	
$1,000-$2,499		57	
$2,500-$4,999		53	
$5,000-$9,999		25	
$10,000+		38	
No answer		32	

(Continued)

Table A.1

RESPONDENT BASES
(Unweighted)
(Continued)

Total	Total (1019)	Did Projects (312)	Plan Projects (284)
By Planned DIY Activity			
DIY only			187
Contractor only			65
Both			26
No answer			6
DIY (Net)			213
Contractor (Net)			91
By Amount Plan To Spend			
Under $100			14
$100-$249			19
$250-$499			26
$500-$999			45
$1,000-$2,499			44
$2,500-$4,999			30
$5,000-$9,999			28
$10,000+			28
No answer			50
By Newspaper Readership			
Frequent reader	605	200	165
Infrequent reader	414	112	119
Past Sunday reader	687	232	206

Table A.2

RESPONDENT PROFILES

	Total	Did Projects	Plan Projects
Base: Total Respondents (Weighted)	(1008)	(296)	(274)
By Income			
Under $15,000	18%	8%	7%
$15,000-$19,999	11	10	11
$20,000-$24,999	13	11	15
$25,000-$29,999	10	11	10
$30,000-$39,999	13	18	20
$40,000-$49,999	8	12	10
$50,000-$74,999	9	15	15
$75,000+	4	5	4
No answer	14	10	8
By Age			
18-20	6%	5%	6%
21-24	11	9	10
25-29	11	10	11
30-34	12	16	17
35-39	11	17	17
40-44	8	8	12
45-49	4	5	4
50-54	6	8	6
55-59	7	9	7
60-64	7	5	4
65+	16	7	4
No answer	2	1	1
By Sex			
Male	48%	48%	51%
Female	52	52	49
By Region			
Northeast	22%	22%	22%
North central	25	24	26
South	34	32	29
West	19	22	23
By Home Ownership			
Own	72%	86%	82%
Rent	27	14	18
No answer	1	*	-

(Continued)

* Less than 0.5%

Table A.2

RESPONDENT PROFILES
(Continued)

Base: Total Respondents (Weighted)	Total (1008)	Did Projects (296)	Plan Projects (274)
By Household Size			
One	18%	9%	9%
Two	31	32	25
Three	19	21	25
Four	17	23	23
Five	9	9	11
Six or more	5	6	7
By Number Working			
None	23%	14%	10%
One	37	37	36
Two	31	40	42
Three or more	10	10	12
By Amount Spent On Projects			
Under $100		7%	
$100-$249		10	
$250-$499		7	
$500-$999		11	
$1,000-$2,499		17	
$2,500-$4,999		17	
$5,000-$9,999		7	
$10,000+		12	
No answer		12	
By Amount Plan To Spend On Projects			
Under $100			5%
$100-$249			7
$250-$499			10
$500-$999			15
$1,000-$2,499			15
$2,500-$4,999			11
$5,000-$9,999			10
$10,000+			10
No answer			17
By Newspaper Readership			
Frequent reader	60%	64%	57%
Infrequent reader	40	37	43
Past Sunday reader	66%	74%	70%

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Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921 5080

ONE DAY'S MAIL:

Advertising Mail And Its Treatment

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper business and its advertisers.

The study was directed and the report written by Nicolas A. Bloom (with the assistance of Albert E. Gollin) of the Research Department.

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August 1987

INTRODUCTION

Daily newspapers face a growing competitive challenge from advertising sent by mail ("direct mail"), sometimes called direct response advertising, ad mail, or "junk mail." Although more is known about direct mail now than when an earlier NAB study was conducted (1982), it continues to be measured and analyzed for its consumer acceptance less often than other forms of advertising.

The purpose of this study of advertising mail is to obtain systematic data on the following topics:

- An inventory of the advertising mail received in households across the nation in one day's delivery;
- How advertising mail is treated;
- How consumers feel about the newspaper vs. mail advertising; and
- Comparative demographics of ad mail volume, how ad mail is treated, and attitudes toward the two advertising media.

Method And Sample

The Direct Ad Mail Study covered a random-digit-dial national probability sample survey of 867 households conducted in several waves in January 1986. The respondents were the first adults to look over the household mail. The first interview consisted of questions about the usual household mail, how they usually handle it, attitudes toward newspaper and mail advertising, and newspaper reading. Respondents were asked to hold one day's mail for a call-back interview.

In the first call-back interview (first half of January), respondents reported how much mail was received that day, and gave a detailed description of the advertising mail and the circulars which they intended to keep from that day's delivery. They were asked to send in all the ad mail and circulars which they did not want to keep. In addition, they were asked to send in all the ad mail addressed to all employed household members at their places of work. (Two postage-paid envelopes, one for ad mail and circulars, the other for business ad mail, had been sent to them with a cover letter and a new $5.00 bill, as an incentive for their cooperation.) In a second call-back interview, most of the respondents from the first call-back interview were contacted again and asked only for the amount of mail and whether or not they would keep each piece of ad mail they received on that day.

The first interview contained equal numbers of respondents from Sunday through Friday; the two waves of call-back interviews were equally distributed across the six mail delivery days, Monday through Saturday.

The samples for this study consisted of the following:

Respondents:	867	completed the first interview;
	658	completed the call-back interview -- first half of January;
	599	completed the call-back interview -- second half of January.
Ad Mail:	2016	pieces received -- 1456 in the first half and 560 in the second half of January.
	503	pieces were kept;
	1513	pieces were thrown away.
	1389	pieces with detailed physical descriptions (one day's mail -- first half of January).

Field work and tabulations were conducted by Henry Senft Research Associates, Port Washington, New York. A copy of the questionnaire is available on request from NAB.

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HIGHLIGHTS

1. American adults received 56 billion pieces of third-class mail in 1986. This represents a substantial increase over the 37.5 billion pieces received in 1982, the year of an earlier NAB study of direct mail.

2. American households received an average of 1.6 pieces of advertising mail per delivery day. Upper-income ($35,000+) respondents receive the most direct mail of any income group -- an average of 1.9 pieces of ad mail based on all households, but 2.8 pieces based on households which received any ad mail. Since people in this income group are the newspaper's prime audience, direct mail competes most strongly for the attention of this key segment of newspaper readers.

3. Three-fourths (75%) of all advertising mail in one day's delivery was thrown out. Consumers who receive more direct mail throw out a higher proportion of this mail. In the 1982 NAB study, only 57 percent of the ad mail was thrown away.

4. The largest amount of advertising mail in the month of January was sent by national advertisers, principally by publishers advertising winter reading materials. Local stores and mail order goods together accounted for almost one-half of the direct mail received.

5. Direct mail is targeted disproportionately toward upper-income ($35,000+) households: these households comprised 30 percent of the sample, but received 36 percent of the direct mail. By way of contrast, the lower-income segment (under $15,000) comprised 22 percent of the sample, and received only 18 percent of the ad mail.

6. People who first look over the household mail ("gatekeepers") carefully select what they will read: more than half of the gatekeepers put aside or throw out at least some of the mail the household receives and one-fourth also throw out at least some of the advertising mail sent to other adults in the household. Upper-income ($35,000+) gatekeepers, the ones direct mailers most want to reach, are more likely than other first readers of the mail to throw out ad mail addressed to others.

7. Direct mail from national advertisers, principally publishers, is more likely than mail from other sources to be thrown away. But as consumers are more likely to keep advertising mail from local stores and mass merchandisers, the direct mail challenge is greatest to daily newspapers' retail advertising business.

8. People do not always keep a piece of ad mail in order to buy directly, either by mail or by phone. Many consumers prefer to go to the local store or the mass merchandiser in order to look at the item or to use the coupons.

9. American adults hold much more favorable attitudes toward newspaper advertising than toward mail advertising. By four-to-one margins, they say that "makes it easier to compare prices at different stores" and "helps me to decide where to shop" are attributes more true of newspaper than of mail advertising. Consumers with higher incomes, who receive larger amounts of direct mail, nevertheless hold more favorable attitudes toward newspaper advertising.

10. One-half (48%) of American adults say that newspapers are the most believable advertising medium, substantially more than the proportion selecting television (21%), magazines, or advertising mail (8% each). As is true of attitudes toward newspapers vs. mail advertising, respondents who got more ad mail were more likely than others to select newspapers as the most believable advertising medium.

SECTION ONE. VOLUME OF HOUSEHOLD DIRECT MAIL

The amount of direct mail advertising that Americans receive was measured in two ways. In the first interview, the person who usually is the first to go through the household mail was asked how often and how much ad mail there was in the average week. In the call-back interviews, they were asked about one day's ad mail.

Ad Mail In The Average Week

Almost all adults (98%) received ad mail at least once a week, with two-fifths (42%) of them getting mail advertising almost every day (see Table 1.1). Upper-income ($35,000+) respondents were the most likely (54%) to find these solicitations in their mailboxes almost every day.

During an average week, American adults received an average of 9.3 pieces of mail advertising. Upper-income respondents got the most ad mail (12.2) and lower-income adults (under $15,000) received the least (6.8). Nearly one-third (31%) of upper-income adults had at least 13 pieces of ad mail delivered in an average week, an average of more than 2 per day.

Table 1.1

ESTIMATED AD MAIL IN AN AVERAGE WEEK

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
How Often Ad Mail Received					
Almost every day	42%	34%	34%	42%	54%
Several times a week	39	38	46	42	35
Once a week	16	23	18	15	10
Less often	2	5	2	1	1
How Many Pieces?					
Less than 5	26%	42%	32%	22%	12%
5-8	31	32	36	36	25
9-12	20	13	20	23	32
13+	20	9	12	19	31
MEAN	9.3	6.8	7.4	9.3	12.2

Questions: "Would you say that you get some kind of advertising mail in the household at least once a week? This could be charities, retail stores, coupons, people selling something, etc. (IF YES) Would you say you get mail advertising about once a week, several times a week, or almost every day?"

"Just making a rough guess, about how many pieces of mail advertising do you get in the household mail in an average week?"

One Day's Mail

Eighty-five percent of American adults received some mail on the day of the call-back interview (see Table 1.2). One-half (47%) of all households received both ad mail and personal mail, 28 percent got only personal mail, and 11 percent had only ad mail delivered on that day. The average household in this study received 1.6 pieces of direct ad mail on the day of the call-back interview.

Table 1.2

COMPOSITION OF ONE DAY'S MAIL

Base: Total respondents	Total (1257)	Under $15K (226)	$15K-$24,999 (260)	$25K-$34,999 (248)	$35K+ (308)
Personal and ad mail	47%	37%	39%	49%	61%
Only ad mail	11	14	13	12	7
Only personal mail	28	26	32	26	21
No mail	15	24	15	13	10
Got any ad mail (Net)	57	50	52	61	69
Got any personal mail (Net)	74	63	71	75	82
Half or more was ad mail	35	36	37	38	35
Mean Number Of Pieces Of Ad Mail					
Among total households	1.6	1.3	1.6	1.6	1.9
Among households which received ad mail	2.8	2.5	3.0	2.7	2.8

Questions: "Could you bring all of today's mail to the phone -- even the catalogs and the mail you would have thrown out. How many pieces of mail were delivered, all together?"

"Please tell me how many personal letters you received today. How many bills or statements are there in today's mail? How many regular magazines are there? And how many other pieces of mail from people you do business with?"

"How many pieces of advertising mail are there? I mean things like catalogs, coupons, political, church, or charitable fund raising mail, and advertising in bills or statements."

Households with at least $35,000 incomes were more likely than households with lower incomes to find both personal (82%) and direct ad mail (69%) in that day's delivery. (Table A.3 contains a detailed demographic analysis of one day's mail.)

In the two call-back interviews combined, a plurality of adults (41%) said that they received about the same amount of mail as usual (see Table 1.3). One-fourth (28%) usually got more mail and 16 percent said they usually got less mail on an average day. This finding indicates that during January 1986 people acknowledged getting somewhat less mail than they usually received.

Table 1.3

COMPARATIVE DESCRIPTION OF AMOUNT OF MAIL

Base: Total Respondents	Total (1257)	Under $15K (226)	$15K-$24,999 (260)	$25K-$34,999 (248)	$35K+ (308)
Received Mail	85%	77%	85%	87%	90%
About the same as usual	41	34	42	43	46
Usually get more	28	28	29	28	24
Usually get less	16	15	14	16	20
Received no mail	15	24	15	13	10

Question: "Do you usually get about this much mail every day or was this more or less than usual?"

Adults in upper-income ($35,000+) households (69%), college graduates (67%), those aged 45-64 (65%), residents of the West (64%), and married adults (62%) were all more likely to have received direct ad mail and to have higher-than-average amounts of direct mail in "today's" delivery (see Table 1.4).

Adults in these demographic categories are also more likely than their counterparts to have read a daily newspaper "yesterday" (see also Appendix Table A.4 for incidences of frequent weekday newspaper readership and of last-four Sunday paper readership). These comparisons underscore the nature of the competitive challenge. Section Five presents data on consumers' attitudes toward these media that consistently favor newspaper advertising in their estimation.

Table 1.4

YESTERDAY READERSHIP AND RECEIPT OF AD MAIL AMONG DEMOGRAPHIC GROUPS

	Read Daily Yester-day	Received Ad Mail	Mean # of Pieces In All HHs	Mean # of Pieces Received Ad Mail	Half Or More Was Ad Mail
Total	65%	57%	1.6	2.8	35%
By Income					
Under $15,000	55%	50%	1.3	2.5	36%
$15,000-$24,999	55	52	1.6	3.0	37
$25,000-$34,999	61	61	1.6	2.7	38
$35,000+	78	69	1.9	2.8	35
By Age					
18-29	51	48	1.1	2.3	30
30-44	63	59	1.6	2.7	34
45-64	74	65	2.1	3.3	41
65+	73	52	1.5	2.9	35
By Education					
Less than H.S. grad	53	45	1.2	2.7	31
High school graduate	62	53	1.4	2.6	32
1-3 years of college	66	61	1.8	2.9	40
College graduate	74	67	2.0	3.0	38
By Sex					
Male	70	57	1.6	2.8	35
Female	62	57	1.6	2.8	35
By Marital Status					
Married	66	62	1.8	2.9	36
Divorced/widowed/ separated	63	50	1.4	2.8	35
Never married	63	48	1.2	2.4	31
By Number Of Adults					
One	63	52	1.6	3.1	39
Two	65	58	1.6	2.7	34
Three or more	68	60	1.6	2.7	35

(Continued)

Table 1.4

YESTERDAY READERSHIP AND RECEIPT OF AD MAIL AMONG DEMOGRAPHIC GROUPS
(Continued)

	Read Daily Yesterday	Received Ad Mail	Mean # of Pieces		Half Or More Was Ad Mail
			In All HHs	Received Ad Mail	
Total	65%	57%	1.6	2.8	35%
By Region					
Northeast	60%	56%	1.4	2.6	29%
North central	67	58	1.6	2.8	37
South	63	53	1.4	2.6	33
West	69	64	2.1	3.3	41
By Newspaper Readership					
Yesterday readers	100	60	1.7	2.8	35
Yesterday non-readers	-	52	1.4	2.7	36
Frequent readers	94	61	1.7	2.9	35
Infrequent readers	30	54	1.4	2.6	36
Non-readers	-	42	1.4	3.4	33

Note: "Read Yesterday" percentages are based on the first interview sample in the first half of January. The remaining columns are based on the combined call-back samples for the entire month of January. Bases for demographic groups are shown in Appendix Table A.1 and the respondent profiles are shown in Appendix Table A.2.

A higher proportion of American households received advertising mail in the first half (68%) than in the second half (45%) of January (see Table 1.5). The average number of direct mail pieces per household fell from 2.2 early in January to 0.9 later in the month; the proportion of households whose mail was at least one-half advertising also fell, from 48 percent to 21 percent. (This pattern may or may not apply to other months during the year.)

Table 1.5

ONE DAY'S MAIL BY HALF-MONTH

		January	
Base: Total Respondents	Total (1257)	First Half (658)	Second Half (599)
Received Mail	85%	88%	82%
Personal Mail	74	73	75
Personal and ad mail	46	53	38
Personal mail only	28	20	37
Ad Mail	57	68	45
Personal and ad mail	46	53	38
Ad mail only	11	15	8
Half or more was ad mail	35	48	21
Number Of Pieces Of Ad Mail			
Among total households	1.6	2.2	0.9
Among households which received ad mail	1.9	2.5	1.1

1986 Vs. 1982 Comparisons

The United States Postal Service (USPS) keeps statistics on the volume of third-class mail, which comprises most of the direct mail sent to households. The amount of third-class mail has increased from 37.5 billion in 1982 to 56 billion in 1986. This increase is reflected in the survey data on the number of pieces of ad mail in an average week (see Table 1.1) and in one day's mail (see Table 1.2).

Adults were more likely to report that they received ad mail "almost every day" in January 1986 (42%) than in October 1982 (30%) (see Table 1.6).* In both years, people with $35,000-plus incomes were much more likely than those with lower incomes to say they got ad mail almost every day.

Table 1.6

HOW OFTEN AD MAIL RECEIVED:
JANUARY 1986 VS. OCTOBER 1982

	January 1986		October 1982	
	Total	$35,000+	Total	$35,000+
Base: Total Respondents	(867)	(199)	(756)	(108)
Almost every day	42%	54%	30%	47%
Several times a week	39	35	39	32
Once a week	16	10	25	19
Less often	2	1	6	3

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* See "National Study of Direct Mail: An Inventory of Household Mail and How It Is Treated" (Newspaper Advertising Bureau, 1983).

The amount of advertising mail received by American households in one day's delivery was about the same in January 1986 (1.6) as it was in October 1982 (1.7). This equality is in part due to the decline in the proportion of households which received ad mail, from 67 percent to 57 percent. However, households which received ad mail had more of it delivered to their homes in January 1986 than in October 1982 (2.8 and 2.6 pieces per delivery day, respectively). Since January traditionally has a below-average amount and October has an above-average amount of ad mail, the equivalence in direct mail pieces per household masks the substantial increase in the volume of direct mail between October 1982 and January 1986. (See also Appendix B: Estimating The Dollar Volume Of Direct Mail In 1986.)

SECTION TWO. SOURCES OF DIRECT MAIL

The sources of advertising mail were measured in two ways. In the first interview, respondents were asked about the advertising mail they were sent; in the call-back interviews, they were asked about the kinds of advertisers who sent them ad mail that day.

Variety Of Advertisers

A wide variety of advertisers send out direct mail.* Almost all (94%) of the respondents to the first interview could recall some type of ad mail they receive (see Table 2.1). The most frequently mentioned types of companies which sent them ad mail were department stores (41%), magazine subscriptions (35%), supermarkets (26%), food coupons (19%), and insurance companies (18%).

Upper-income ($35,000+) adults were more likely than their counterparts to receive advertising from department stores (46%), book clubs (24%), charities (22%), and financial organizations -- insurance companies (24%), credit card companies (14%), and banks (9%).

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* See Tables A.5 for a more detailed distribution of advertisers who sent ad mail and Tables A.6-A.17 for physical characteristics of one day's ad mail.

Table 2.1

TYPES OF AD MAIL RECEIVED

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Department Store	41%	39%	34%	46%	46%
Magazines	35	29	35	37	38
Supermarkets	26	32	29	21	27
Coupons for food/ grocery products	19	19	19	17	21
Insurance companies	18	15	19	15	24
Book clubs/companies	17	10	17	18	24
Charities/fund-raising groups	16	16	10	19	22
Mail order companies	15	11	16	17	19
Discount stores	14	11	11	14	18
Credit card companies	10	5	8	11	14
Contests	8	6	10	4	10
Record/tape/cassette clubs	7	4	5	7	9
Building supply stores	6	3	4	6	10
Other stores	6	6	8	6	6
Drug stores	6	7	5	6	6
Banks	6	2	3	8	9
Local merchants	4	3	5	4	6
"Collectibles"	3	3	2	3	4
Automotive	3	4	3	2	6
Fast food restaurants	3	3	4	2	3
Political	2	3	2	3	2
Religious	2	3	1	1	3
Household services	2	2	2	2	2
Toiletries	1	2	2	1	1
Household furnishings	1	1	-	1	2
Real estate	1	1	2	2	2
Education/entertainment	1	1	1	1	1
Other	9	6	9	11	11
None/various/no answer	6	6	4	3	2

Question: "What kinds of companies or organizations send you mail advertising?"

Who Received This Mail?

Two-fifths (38%) of the advertising mail on the day of the call-back interview was sent by national advertisers, principally from publishers (18%) (see Table 2.2). Another one-fourth (25%) came from local advertisers -- stores, services, shoppers, etc. An additional one-fifth (22%) of direct mail was mail order goods, a category which contains both national and local companies. The remaining 14 percent were sent by mass merchandisers, e.g., Sears, J. C. Penney.

Overall, there was little variation in the distribution of direct mail within income categories. Mail sent to upper-income ($35,000+) households contained a higher proportion (42%) of national ad mail than did the mail sent to households in the other income groups. Ad mail sent to lower-income (under $15,000) households contained more mail order goods (28%), and less from publishers (14%). Households with $15,000-$24,999 incomes received a higher proportion (18%) of mail from mass merchandisers; households with $25,000-$34,999 incomes had somewhat more mail from local advertisers than did other income groups.

Table 2.2

ADVERTISERS WHO SENT DIRECT MAIL
BY INCOME LEVEL

Base: Ad Mail Pieces	Total (1880)	Under $15K (278)	$15K-$24,999 (357)	$25K-$34,999 (373)	$35K+ (574)
Nationwide Direct Mail (Net)	38%	33%	38%	37%	42%
Publishers	18	14	21	17	21
Non-profit	5	7	5	5	5
Insurance/financial	5	3	3	5	6
Coupons	5	5	6	4	5
Miscellaneous industries	2	1	1	4	3
All other	2	3	2	1	3
Mail Order Goods (Net)	22%	28%	16%	21%	19%
Multi gifts/gadgets	5	10	4	4	4
Single category catalogs	13	15	9	13	10
Single items/general merchandise	4	3	3	4	5
Local (Net)	25%	27%	27%	30%	25%
Stores (Sub-Net)	10	9	10	12	11
Department stores	2	*	1	3	2
All other stores	8	9	10	9	8
Shoppers	3	4	1	4	2
Services	5	4	5	4	5
Educational/entertainment/"cultural"	2	3	3	2	2
Political	1	*	1	1	1
Shared mail	3	3	4	5	2
Other	2	3	2	2	2
Mass Merchandisers (Net)	14%	13%	18%	13%	14%
National chains	3	4	2	2	3
Discount chains	4	3	4	3	3
Supermarkets	2	3	4	2	1
Other mass merchandisers	5	4	8	5	6
Combinations					
Total retail stores (local stores + mass merchandisers)	23%	22%	28%	24%	24%
Total retail (total retail stores + mail order goods)	49	45	45	43	43

* Less than 0.5%

Targeting Of Direct Mail

Although households with different incomes received fairly similar mixes of advertising mail, they did not get the same volume. Upper-income ($35,000+) households constituted 30 percent of our call-back sample, but their day's delivery had 36 percent of the advertising mail (see Table 2.3). Lower-income (under $15,000) households, on the other hand, comprised 22 percent of the sample but received only 18 percent of the direct mail.

Upper-income households were targeted by a wide variety of advertisers. National advertisers sent 40 percent of their direct mail to this income segment; insurance and financial marketers (51%), publishers (40%), and coupon mailers (39%) targeted this group most heavily. Local stores (37%), national chains (41%), discount chains (36%) also sent a disproportionate amount of their advertising to upper-income households. By way of contrast, national advertisers sent a disproportionately lower percentage (15%) of their advertising to lower-income (under $15,000) households. Mail order companies (25%) and national chains of mass merchandisers (22%) targeted lower-income households.

Table 2.3

TARGETING OF DIRECT MAIL

	(Base)	Under $15K	$15K-$24,999	$25K-$34,999	$35K+
Base: Ad Mail Pieces*	(1582)	18%	23%	24%	36%
Nationwide Direct Mail (Net)	(607)	15%	22%	23%	40%
Publishers	(297)	13	25	22	40
Non-profit	(86)	23	22	23	31
Insurance/financial	(71)	10	14	25	51
Coupons	(79)	16	25	19	39
Miscellaneous industries	(39)	10	10	38	41
All other	(35)	26	20	11	43
Mail Order Goods (Net)	(314)	25	18	24	32
Multi gifts/gadgets	(76)	36	18	17	29
Single category catalogs	(181)	23	18	27	32
Single items/general merchandise	(66)	12	18	24	45
Local (Net)	(422)	18	23	26	33
Stores	(167)	15	22	26	37
Shoppers	(43)	26	12	35	28
Services	(74)	16	26	19	39
Educational/entertainment/ "cultural"	(40)	18	27	23	32
Political	(13)				
Shared mail	(50)	18	26	34	22
Other	(35)	26	20	23	31
Mass Merchandisers (Net)	(225)	16	28	21	35
National chains	(46)	22	17	20	41
Discount chains	(56)	16	29	20	36
Supermarkets	(36)	19	36	25	19
Other mass merchandisers	(87)	11	31	21	37
Combinations					
Total retail stores (local stores + mass merchandisers)	(392)	16%	26%	23%	35%
Total retail (total retail stores + mail order goods	(706)	20	23	24	34

* The base is ad mail pieces from identified types of advertisers sent to respondents who answered the income question.

When Did They Receive Direct Mail?

More direct mail was delivered on Tuesday (422 pieces, 22% of the total) than on any other day of the week (see Table 2.4). Monday and Wednesday each saw the arrival of an additional 17 percent of the ad mail received by our sample.

Advertising from different sources tended to arrive on different days of the week. National advertising (44%) was a higher proportion of Monday's mail than on any other day of the week. Mail order goods, on the other hand, were a more common part of Friday's (29%) and Saturday's (31%) mail. Local advertisers and mass merchandisers timed their deliveries to arrive in mid-week: 36 percent of Wednesday's and 29 percent of Thursday's mail were from local advertisers; 17 percent each of Tuesday's and Wednesday's deliveries were from mass merchandisers.

There was much more advertising mail (from known sources) received during the first half of January than during the second half of January (1389 pieces vs. 491 pieces, respectively) (see Table 2.5). Greater proportions of mail from national advertisers (41% vs. 31%), particularly publishers (20% vs. 13%), were delivered early in January. The latter half of January saw higher proportions of mail from mass merchandisers (18% vs. 13%) and local advertisers (31% vs. 23%), particularly from stores (15% vs. 8%).

Table 2.4

COMPOSITION OF AD MAIL BY DAY OF WEEK

Base: Ad Mail Pieces	Total (1880)	Monday (324)	Tuesday (422)	Wednesday (324)	Thursday (287)	Friday (249)	Saturday (274)
Nationwide Direct Mail (Net)	38%	44%	36%	32%	41%	41%	39%
Publishers	18	22	14	14	16	25	20
Non-profit	5	4	5	6	7	5	4
Insurance/financial	5	5	6	5	5	4	6
Coupons	5	5	7	3	8	4	5
Miscellaneous industries	2	3	2	2	3	2	1
All other	2	4	1	3	2	2	2
Mail Order Goods (Net)	22	20	24	14	15	29	31
Local (Net)	25	24	23	36	29	19	20
Stores (Sub-net)	10	10	8	13	14	7	5
Department stores	2	2	1	2	2	2	1
All other stores	8	7	6	11	12	6	3
Shoppers	3	2	2	6	2	2	2
Services	5	5	5	5	4	5	5
Educational/entertainment/"cultural"	2	3	2	1	3	2	3
Political	1	1	1	1	1	*	*
Shared mail	3	2	4	6	3	1	1
Other	2	2	1	5	1	1	4
Mass Merchandisers (Net)	14	12	17	17	15	10	10
National chains	3	3	2	2	5	3	2
Discount chains	4	2	7	5	2	2	2
Supermarkets	2	1	3	2	4	2	1
Other mass merchandisers	5	5	5	8	4	4	4
Combinations							
Total retail stores (local stores + mass merchandisers)	23%	21%	25%	31%	29%	18%	15%
Total retail (total retail stores + mail order goods	45	41	49	44	44	46	46

* The base is ad mail pieces from identified types of advertisers sent to respondents on different days of the week.

Table 2.5

SOURCES OF AD MAIL BY WAVE

Base: Ad Mail Pieces	Total (1880)	First Half of January (1389)	Second Half of January (491)
Nationwide Direct Mail (Net)	39%	41%	31%
Publishers	18	20	13
Non-profit	5	6	4
Insurance/financial	5	5	5
Coupons	5	6	3
Miscellaneous industries	2	2	1
All other	2	2	2
Mail Order Goods (Net)	22	23	20
Multi gifts/gadgets	5	5	5
Single category catalogs	13	13	11
Single items/general merchandise	4	4	4
Local (Net)	25	23	31
Stores (Sub-net)	10	8	15
Department stores	2	1	3
All other stores	8	6	12
Shoppers	3	2	4
Services	5	5	5
Educational/entertainment/ "cultural"	2	2	3
Political	1	1	1
Shared mail	3	4	1
Other	2	2	3
Mass Merchandisers (Net)	14	13	18
National chains	3	3	4
Discount chains	4	4	3
Supermarkets	2	2	3
Other mass merchandisers	5	4	8
Combinations			
Total retail stores (local stores + mass merchandisers)	23%	20%	32%
Total retail (total retail stores + mail order goods)	45	43	52

Question: "What company, store, or organization sent it to you?"

SECTION THREE. HOW AD MAIL WAS TREATED

How The Mail Was Usually Handled

The respondents in this study were the first persons in their households to look at the mail. Two-thirds (68%) of these respondents were women. The proportions of these "gatekeepers" who were at home when the mail arrived (49%) or who picked it up when they get home from work (47%) varied significantly by income group (see Table 3.1). Women (56%) are more likely than men (36%) to be at home when the mail arrives, as is consistent with their lower rate of participation in the work force.

In the first interview, respondents were also asked about how they usually handled the household mail (see Table 3.2). Two-fifths (38%) said they read through all of it. Others read only some of the mail -- either putting some of it aside (29%) or throwing some out (26%) -- or put all of it aside until later (8%). Adults with household incomes of at least $25,000 are more likely than their lower-income counterparts to read only some of the mail (62% vs. 46%).

Table 3.1

WHERE RESPONDENT IS WHEN MAIL ARRIVES

	Total	Under $15K	$15K-$24,999	$25K-$34,999	$35K+
Base: Total Respondents	(867)	(158)	(167)	(158)	(199)
At home when mail arrives	49%	71%	44%	39%	38%
Pick it up when I get home from work	47	23	53	55	58
Other	4	6	3	6	4
Base: Women	(586)	(127)	(120)	(95)	(118)
At home when mail arrives	56%	71%	48%	47%	46%
Pick it up when I get home from work	40	23	48	46	51
Other	4	6	3	7	3
Base: Men	(280)	(31)*	(47)	(63)	(81)
At home when mail arrives	36%	71%	32%	29%	27%
Pick it up when I get home from work	61	26	66	68	69
Other	3	3	2	3	4

* Caution: Small base size.

Question: "Are you usually at home when the mail arrives, do you pick it up when you get home from work, or what else?"

Table 3.2

FIRST HANDLING OF AD MAIL

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Read through all of it	38%	44%	42%	31%	34%
Read through some, put other things aside	29	26	27	34	30
Read some things, throw other things away	26	21	18	29	32
Put it all aside till later	8	9	13	6	5

Question: "And when you pick up the mail, what is usually the next thing you do -- do you read through all of it right away, do you read some things and put other things aside till later, do you read some things and throw other things away, or do you put it all aside till later?"

Advertisements (66%), bills (28%), magazine subscriptions offers (16%), and contests or sweepstakes (14%) were the most frequently cited as types of mail usually put aside (see Table 3.3). Advertisements (81%) were also the kind of mail that was most frequently cited as thrown out, followed by contests or sweepstakes (25%), magazine subscription offers (19%), and insurance companies' mail (14%). Looking at these proportions in another way, one-fifth (21%) of the total sample state that they usually throw out some of their advertising mail without reading it.

Table 3.3

KINDS OF AD MAIL PUT ASIDE/THROWN OUT

Base: Number Of Respondents	Put Aside (249)	Thrown Out (223)
Advertisements	66%	81%
Bills	28	1
Magazine subscription offers	16	19
Contests/sweepstakes	14	25
Catalogs/brochures	11	12
Coupons	10	7
Insurance companies	6	14
Book club offerings	5	7
Credit card companies	4	5
Mail for others in family	4	2
Banks	4	-
Record/tape/cassette club offerings	2	1
Junk mail	2	1
Sales/store information	2	1
Religious	2	1
Political	2	2
Other	5	3

Questions: (IF "PUT OTHER THINGS ASIDE") "What kinds of mail do you put aside till later?" OR (IF "THROW OTHER THINGS AWAY") "What kinds of mail do you throw away?"

Two-thirds (67%) of the "gatekeepers" would save a piece of direct ad mail addressed to another person in the household without regard to the other's expected interest in that piece of mail (see Table 3.4). However, 17 percent would just throw it out, a figure that is quite close to the 21 percent of the total sample who said they would throw out some of their ad mail. Upper-income ($35,000+) respondents were much more likely (25%) than "gatekeepers" in lower-income households to say they would throw out a piece of ad mail addressed to someone else.

Table 3.4

WHAT'S DONE WITH ADVERTISING MAIL
ADDRESSED TO OTHERS

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Would save it regardless	67%	65%	73%	66%	65%
Would throw it out	17	10	14	17	25
Would do both/depends on ad	7	8	5	7	9
I'm the only adult in the household	7	15	7	8	1
Other	2	2	1	3	1

Question: "I understand that most of the time you are the first person in your household to see the mail. Suppose that the day's mail included a piece of advertising addressed to someone else in your household. Would you save it for that person regardless, or would you throw it out if you were sure it was something the other person didn't want, or what else would you do?"

How One Day's Ad Mail Was Handled

In the call-back interview, respondents were asked to sort that day's ad mail into two groups--the pieces they would keep and the pieces they would have thrown away. They were than asked a series of questions about the advertising mail they wanted to keep and were also asked to send in the remaining items to the research company. The research company then coded the ad mail that the respondents were keeping, how these pieces were handled by the households, and why each piece was being kept.

Respondents threw out three-fourths (75%) of the advertising mail received in "one day's" mail.* Adults in all income groups threw out about the same proportion of the ad mail they received. However, respondents who received more ad mail threw out a higher percentage of it: Adults who got only one piece kept 44 percent of this mail; people with three to five pieces kept only one-fourth of them; and consumers who received six or more pieces saved only 14 percent of their ad mail on that one day (See Table 3.5). By way of contrast, in October 1982 only 57 percent of the ad mail received in that day's delivery was thrown out.

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* Respondents received a total of 2016 pieces of advertising mail. In the first half of January, 67 pieces were thrown out but not included in the tabulations of ad mail sent to the research company, and in the second half of January, 69 pieces were thrown out before the call-back interview began. There are no data of any kind on these ad mail pieces.

Table 3.5

DISPOSITION OF AD MAIL BY AMOUNT RECEIVED

		% Of Ad Mail	
	(Base)*	Kept	Thrown Out
Total Respondents	(718)	25%	75%
Received			
1 piece	(258)	44%	56%
2 pieces	(165)	34	66
3	(113)	25	75
4	(57)	26	74
5	(57)	27	73
6+ pieces	(69)	14	86

* Base=Respondents who received that number of ad mail pieces in one day's mail.

Overall, 27 percent of ad mail items from known sources were kept (see Table 3.6). By category, lower percentages of nationwide (23%) and local ad mail (25%) were kept than of mail order goods (33%) and mass merchandisers (32%). Among the items that were kept more than the average, though accounting for only a small proportion of the total volume, were coupons, department store ads, and ads from national chain stores.

Table 3.6

ONE DAY'S MAIL: PERCENTAGE OF ITEMS KEPT

	(Base)	Items Sent	Items Kept
Base: Ad Mail Pieces From Known Sources	(1874)	100%	27%
Nationwide Direct Mail (Net)	(727)	38%	23%
Publishers	(343)	18	17
Non-profit	(102)	5	15
Insurance/financial	(96)	5	15
Coupons	(98)	5	49
Miscellaneous industries	(44)	2	34
All other	(44)	2	32
Mail Order Goods (Net)	(409)	22	33
Multi gifts/gadgets	(92)	5	39
Single category catalogs	(242)	13	33
Single items/general merchandise	(75)	4	24
Local (Net)	(476)	25	25
Stores	(178)	10	37
Department stores	(33)*	2	58*
All other stores	(145)	8	32
Shoppers	(51)	3	22
Services	(89)	5	17
Education/entertainment/"cultural"	(43)	2	26
Political	(17)*	1	18*
Shared mail	(55)	3	2
Other local	(43)	2	33
Mass Merchandisers (Net)	(262)	14	32
National chains	(54)	3	48
Discount chains	(69)	4	22
Supermarkets	(43)	2	40
Other mass merchandisers	(96)	5	26
Combinations			
Total retail stores (local stores + mass merchandisers)	(440)	23%	34%
Total retail (total retail stores + mail order goods)	(849)	45	33

* Caution: Small base size.

Questions: (Second interview) "Please sort today's advertising mail into two groups - those pieces of advertising mail you plan to keep and those pieces you planned to throw away."
(Third interview) "Do you plan to keep this piece of advertising mail or do you plan to throw it away?"

One-third (36%) of the ad mail pieces that were saved were read right away, 32 percent were put aside to be read later, 23 percent were scanned quickly and saved for additional consideration, and 11 percent were saved for another person in the household (see Table 3.7).*

Table 3.7

WHAT HAPPENED TO AD MAIL

	Total
Base: Ad Mail Pieces Kept	(503)
Read through it right away	36%
Put it aside to read later	32
Put it aside for someone else to read/ gave it to someone else	11
Scanned it quickly and then saved	23

Note: Multiple answers possible.

Question: "What happened to this piece of advertising mail? Did you..."

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* Note that these data are based on ad mail pieces received in one day's mail. The figures in Table 3.4 (page 25) are based on what respondents said they do in general, rather than their handling of one day's mail.

We have already seen that three-fourths of all advertising mail pieces were thrown out. But why did people keep the pieces they did? Mail advertising was kept principally in order to buy something through the mail (26%), just to look at (23%), to use the coupons (16%) or to go to the store to look at an item (13%) (see Table 3.8).

Thus in three of four cases, mail advertising is not a direct-response medium, kept in order to buy an item at that moment, either by mail or by phone. Newspaper ads compare very favorably for their capacity to perform this and other types of services to consumers, especially to generate store traffic.

Table 3.8

WHY AD MAIL PIECE WAS KEPT

Base: Ad Mail Pieces Kept	Total (503)
To buy/order through mail	26%
Just to look at	23
Use coupons	16
Go to store to look at item	13
Give to other family member	11
Shopping/might want/need product	7
Keep to use for sale	1
Only to pay bill/no interest in advertising	1
No answer	7

Note: Multiple answers possible.

Question: "Why are you keeping this piece of advertising mail?"

The reasons for keeping a piece of advertising mail depended, in part, on the kind of company that sent it. Advertising from retail stores was less likely to be kept to order merchandise through the mail or by phone than was mail from other kinds of advertisers (see Table 3.9). Rather, people used retail mail advertising for the coupons (e.g., 25% of the local retail store items kept) or as a guide for what to look at during their next trip to the store (e.g., 37% of the mass merchandisers' items kept).

Table 3.9

WHY AD MAIL PIECE WAS KEPT
BY TYPE OF RETAIL ADVERTISER

Base: Ad Mail Kept	Total (503)	Total Retail Stores (148)	Local Retail Stores (65)	Mass Merchandisers (83)
To buy/order through mail	26%	14%	9%	17%
To buy/order by phone	1	3	2	4
Go to store to look at item	13	33	28	37
Use coupons	16	18	25	13

SECTION FOUR. CIRCULARS AND BUSINESS ADVERTISING MAIL

Receipt of circulars was also measured in two ways. In the first interview, respondents were asked if they ever received advertising left on their doorstep and from which kinds of stores. In the call-back interview during the first half of January, they were asked about circulars left at their doors on that day.

Circulars

Less than one-half (46%) of American households acknowledged the receipt of circulars (see Table 4.1). The average number of circulars received in an average week was just 1.0.

Upper-income ($35,000+) households were most likely to receive circulars (54%) and to receive the greatest number in an average week (1.3). Lower-income households (under $15,000), on the other hand, were the least likely to get any circulars delivered (38%) and to find the fewest circulars (0.8) sitting on their doorsteps in an average week. These findings are consistent with the often-noticed practice of targeting circulars to the more well-to-do households.

Table 4.1

DELIVERY OF CIRCULARS

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Receive Circulars	46%	38%	47%	42%	54%
From:					
Supermarkets	17%	17	17	16	19
"Local merchants"	15	11	15	15	11
Department stores	7	8	5	10	8
Restaurants/fast food stores	6	6	10	6	6
Home improvement	5	6	2	4	8
Household services	5	3	5	4	7
Discount stores	4	5	2	3	7
Drug stores	3	3	4	3	4
Other	13	13	10	11	18
Circulars received in an average week (MEAN)	1.0	0.8	0.9	0.9	1.3

Questions: "Do you also get advertising that doesn't come through the mail but is just left at your door?"

(IF YES) "Just making a rough guess, about how many circulars or flyers are left at your door in an average week? I mean advertising that is left at your door."
"For what kinds of stores is this advertising?"

Households which spent larger amounts per week on groceries were about as likely as other households to receive supermarket circulars: the range was only between 15 percent among households spending $50-$75 a week and 21 percent among households spending $76-100 per week on groceries (see Table 4.2). By way of contrast, adults with the highest grocery expenditures were the most likely of all both to read four or five Monday-to-Friday issues of the daily newspaper (62%) and to read the Sunday paper every week (68%). These findings clearly show the greater reach afforded by the daily and Sunday paper.

Table 4.2

NEWSPAPER READERSHIP AND SUPERMARKET CIRCULARS BY WEEKLY GROCERY EXPENDITURE

		Weekly Grocery Expenditure			
	Total	Under $50	$50-$75	$76-$100	$100+
Base: Total Respondents	(867)	(270)	(312)	(150)	(121)
Receive supermarket circulars	17%	17%	15%	21%	17%
Read daily newspaper yesterday	65	63	63	65	70
Frequent daily newspaper reader (4-5 weekdays)	56	53	56	59	62
Read Sunday newspaper on all of last four Sundays	59	51	60	65	68

Questions: "Just making a rough guess, how much would you say your household spends per week on groceries - less than $50, between $50 and $75, between $76 and $100, or more than $100?"

Respondents were also asked questions about the 232 circulars they received on the day of the call-back interview (see Table 4.3). The largest proportions of these circulars were sent by mass merchandisers (33%), local stores (25%), and supermarkets (16%).

Almost nine-tenths (88% -- 204 out of 232) of these circulars were thrown out. Unless they had already been used for that day's shopping or some mental or written note of their content had been made before the interview, the vast preponderance of circulars could not have influenced consumers' shopping decisions.

Table 4.3

ONE DAY'S CIRCULARS

	Total
Base: Total Circulars	(232)
Mass merchandisers	33%
Local stores	25
Supermarkets	16
Local services	5
Shoppers	5
Other	16

Question: "Could you bring to the phone all of today's circulars, that is, advertising left at your door or hung on the outside of your mailbox. Who sent it?"

Ad Mail Sent To Places Of Work

Respondents were asked if there were any working adults in their household. Three fourths (78%) of American households had at least one working adult (see Table 4.4). Respondents in these households were asked to send in all the unwanted ad mail sent to all working household members on the day of the call-back interview.

Table 4.4

AD MAIL AT PLACE OF WORK

	Total	Under $15K	$15K-$24,999	$25K-$34,999	$35K+
Base: Households With Employed Adults	(666)	(71)	(138)	(140)	(185)
Receive Ad Mail At Place Of Work					
Yes	26%	16%	15%	30%	37%
No	74	85	85	70	63

Questions: "Including yourself, how many adults in your household are currently employed, either part-time or full-time?"

"Do you (or any of these employed adults in your household) receive any advertising mail in the work place?"

A total of 69 pieces of ad mail addressed to places of work were sent in (see Table 4.5). The principal advertisers sending these pieces were publishers (33%), vendors of office products and equipment (26%), and organizations offering education or training (19%). (Table A.18 shows the physical characteristics of business direct mail.)

Table 4.5

WHO SENT BUSINESS ADVERTISING MAIL

	Total
Base: Ad Mail Sent To Place Of Work	(69)
Publishers	33%
Office products/equipment	26
Education/training	19
Local services	7
Other	14

SECTION FIVE. ATTITUDES TOWARD ADVERTISING MEDIA

Consumers' attitudes toward direct mail are a prime element in determining how they respond to the mail advertising they receive on any given day. This section examines American adults' opinions about mail and newspaper advertising, circulars, and the advertising medium that is the most believable.

Attitudes Toward Mail Vs. Newspaper Advertising

Consumers hold much more favorable attitudes toward newspaper advertising than they hold toward advertising mail. By margins of four-to-one, they said that newspaper advertising, rather than advertising mail, "makes it easier to compare prices at different stores" (78% vs. 19%) and "helps me decide where to shop" (77% vs. 18%) (see Table 5.1). Two other statements were evaluated as more favorable to ads in daily newspapers than to ad mail by approximately two-to-one margins: "advertises the kinds of products I'm most interested in buying" (65% vs. 29%), and "gets me when I'm in the mood to read" (62% vs. 34%). A final statement, "makes products look a lot better than they are," found ad mail viewed critically far more often (66% vs. 28%) than newspaper ads.

Table 5.1

COMPARISON OF MAIL AND NEWSPAPER ADVERTISING

	Percent Saying		
	Newspapers	Direct Mail	DK/NA
Makes it easier to compare prices at different stores	78%	19%	3%
Helps me to decide where to shop	77	18	5
Advertises the kinds of products I'm most interested in buying	65	29	5
Gets me when I'm in the mood to read	62	34	4
Makes products look a lot better than they are	28	66	6

Question: "Now I'd like to read some short statements about advertising. After I read each one, please tell me whether that statement is more true of mail advertising or daily newspaper advertising?"

The edge that newspapers have over ad mail exists in the judgments of consumers in all income groups (see Table 5.2). Respondents in all age groups, especially over the age of 30, were also more favorably disposed toward newspaper than toward mail advertising on the key statements of comparing prices, where to shop, and advertising the products they want to buy. Ad mail got slightly better relative ratings from the 18-29 age group and from those with household incomes under $15,000, but even there, the great majority favored newspapers.

Regardless of how receipt of ad mail was measured--by the number of pieces in one day's mail, the number of pieces in an average week, or by the frequency with which they receive direct mail--adults who received more ad mail were more likely than their counterparts to say that mail advertising "makes products look a lot better than they really are." And recipients of light as well as heavy volumes of ad mail nevertheless consistently preferred newspaper advertising.

Overall, more than one-half (52%) of American adults favored daily newspaper over mail advertising on four (36%) or all five (16%) of the statements discussed above (see Table 5.3). Only 13 percent selected ad mail over newspaper advertising on four or on all five statements.

Table 5.2

COMPARISON OF MAIL AND NEWSPAPER ADVERTISING AMONG DEMOGRAPHIC GROUPS

	Percent Who Favor Newspaper Advertising				Mail Ads Look Too Good
	Prices	Where	Pro-ducts	Mood	
Total	78%	77%	65%	62%	66%
By Income					
Under $15,000	70%	70%	60%	61%	53%
$15,000-$24,999	79	77	65	62	69
$25,000-$34,999	82	74	67	60	68
$35,000+	80	79	65	60	73
By Age					
18-29	76	72	57	65	67
30-44	79	79	68	56	68
45-64	80	81	68	65	71
65+	73	73	67	63	54
By Education					
Less than H.S. grad	72	68	63	68	58
High school graduate	76	78	68	60	67
1-3 years of college	80	81	66	61	70
College graduate	81	76	61	63	66
By Sex					
Male	81	79	69	67	68
Female	77	76	63	59	64
By Marital Status					
Married	78	78	67	62	71
Divorced/widowed/ separated	78	72	63	57	57
Never married	76	79	59	68	63
By Number Of Adults					
One	78	72	63	60	57
Two	78	78	67	61	68
Three or more	77	81	63	66	71
By Region					
Northeast	75	74	61	59	62
North central	78	77	64	64	66
South	76	77	66	62	67
West	83	80	69	60	69

(Continued)

Table 5.2

COMPARISON OF MAIL AND NEWSPAPER ADVERTISING AMONG DEMOGRAPHIC GROUPS (Continued)

	Percent Who Favor Newspaper Advertising				Mail Ads
	Prices	Where	Products	Mood	Look Too Good
Total	78%	77%	65%	62%	66%
By Ad Mail Today					
None	78%	75%	65%	63%	67%
1-2 pieces	80	78	68	62	68
3+ pieces	80	79	67	56	72
By Receipt Of Ad Mail					
Daily	78	77	65	60	69
Several times a week	80	79	68	66	68
Once a week or less	74	73	62	58	52
By Ad Mail In Average Week					
0-5 pieces	76	74	65	61	63
6-10 pieces	79	82	67	64	64
11+ pieces	80	75	65	62	74
By Newspaper Readership					
Yesterday readers	82	82	70	67	66
Yesterday non-readers	71	68	56	52	66
Frequent readers	81	84	70	67	65
Infrequent readers	78	71	62	58	67
Non-readers	53	57	45	41	64

"Prices" : Makes it easy to compare prices at different stores
"Where" : Helps me decide where to shop
"Products" : Advertises the kinds of products I'm most interested in buying
"Mood" : Gets me when I'm in the mood to read
"Look Too Good": Makes products look a lot better than they really are

Table 5.3

SUMMARY OF COMPARISONS OF MAIL AND NEWSPAPER ADVERTISING AMONG DEMOGRAPHIC GROUPS

	Number Of Ratings In Favor Of Newspaper Advertising				
	All 5	4	3	2	1/0
Total*	16%	36%	25%	11%	13%
By Income					
Under $15,000	22%	30%	22%	10%	16%
$15,000-$24,999	17	34	24	13	13
$25,000-$34,999	11	35	35	10	9
$35,000+	11	37	26	13	13
By Age					
18-29	12	34	29	12	14
30-44	13	32	30	14	11
45-64	14	42	21	11	11
65+	30	32	18	6	15
By Sex					
Male	15	40	25	10	9
Female	16	34	25	12	14
By Number Of Adults					
One	21	32	24	9	14
Two	15	36	25	11	13
Three or more	9	40	27	15	10
By Region					
Northeast	16	31	32	9	12%
North central	15	38	22	14	11
South	16	36	22	12	14
West	15	37	28	8	12
By Receipt Of Ad Mail					
Daily	13	36	26	11	15
Several times a week	16	38	25	12	10
Once a week or less	22	31	24	10	13
By Ad Mail In Average Week					
0-5 pieces	18	33	26	10	14
6-10 pieces	17	34	30	9	10
11+ pieces	11	42	18	17	13
By Newspaper Readership					
Yesterday readers	17	39	26	10	9
Yesterday non-readers	13	29	24	14	20
Frequent readers	19	39	24	10	9
Infrequent readers	12	34	27	13	13
Non-readers	9	23	24	12	32

* Base: Answered all five statements.

Preferred Medium For Department Store Sale Booklets

A slightly higher proportion of American adults preferred booklets advertising a department store sale inserted in the Sunday newspaper rather than sent through the mail (43% vs. 39%) (see Table 5.4). The remaining one-fifth of the sample (18%) had no preference as between the two.

Three-fifths (63%) of the respondents said they have department stores credit cards. Those who have department store charge cards were as likely as those who do not have them to prefer department store sale booklets inserted in the Sunday paper.

Preferred Medium For Grocery Ads

Seventy percent of American adults preferred grocery ads in daily newspapers; the remainder were equally divided between those who preferred these ads in circulars left at their doors (14%) and those who had no preference between daily newspapers and circulars (16%) (see Table 5.5).

Respondents whose households spent at least $100 per week on groceries were slightly less likely than their counterparts to prefer their grocery ads left at their doors.

Table 5.4

PREFERRED MEDIUM FOR DEPARTMENT STORE SALE BOOKLETS

		Own Department Store Credit Cards	
Base: Total Respondents	Total 100% (867)	Yes 63% (547)	No 37% (320)
Prefer Department Store Sale Booklets			
In Sunday newspaper	43%	42%	43%
By mail	39	40	38
No preference	18	18	18

Question: "Sometimes the same ad is distributed in more than one way. For example, the Sunday newspaper might contain a circular or booklet advertising a department store sale, and the same item might also be sent through the mail. How would you rather get a department store ad of this type -- through the mail or in a newspaper?"

Table 5.5

PREFERENCE FOR GROCERY ADS IN NEWSPAPERS OR CIRCULARS BY GROCERY EXPENDITURE

		Weekly Grocery Expenditure			
Base: Total Respondents	Total (867)	Under $50 (270)	$50-$75 (312)	$76-$100 (150)	$100+ (121)
In newspapers	70%	66%	73%	71%	69%
Left at door	14%	15	16	15	9
No preference	16	19	12	14	22

Question: "Do you prefer grocery ads in daily newspaper or grocery ads left at your door?"

Most Believable Advertising Medium

In the first interview, all respondents were asked to select the most believable advertising medium from among mail advertising, newspapers, television, radio, and magazines. Almost one-half (48%) chose newspapers, 21 percent named television, and 8 percent each picked magazines and mail advertising (see Table 5.6). The remainder answered either "radio" (4%), "all media are equally believable" (6%), or gave no answer (6%). (These responses are not shown in Table 5.6.)

Older (45+) respondents and recipients of at least 3 pieces of ad mail on the day of the call-back interview were more likely than others to have picked newspapers as the most believable advertising medium. Income and education did not significantly influence the choice of newspapers as the most believable advertising medium.

Respondents in households with under $15,000 incomes were relatively more likely than others to name mail advertising as the most believable medium (13%). Respondents who never read either a daily or a Sunday paper (12%) were also relatively more favorable toward ad mail. (Appendix Table A.4 shows that there was a substantial overlap between these two groups.) But for them as for others, newspapers were chosen most often as the most believable advertising medium.

Table 5.6

MOST BELIEVABLE ADVERTISING MEDIUM AMONG DEMOGRAPHIC GROUPS

	News-papers	Tele-vision	Maga-zines	Ad Mail
Total	48%	21%	8%	8%
By Income				
Under $15,000	44	23	4	13
$15,000-$24,999	47	21	9	7
$25,000-$34,999	48	22	11	8
$35,000+	48	17	12	5
By Age				
18-29	41	27	11	8
30-44	43	21	10	7
45-64	54	18	8	8
65+	55	19	4	6
By Education				
Less than H.S. grad	44	25	6	9
High school graduate	49	26	4	7
1-3 years of college	49	17	11	8
College graduate	46	17	13	7
By Sex				
Male	46	24	10	6
Female	49	20	8	8
By Marital Status				
Married	49	21	8	8
Divorced/widowed/ separated	44	22	7	8
Never married	47	20	13	5
By Number Of Adults				
One	46	22	9	8
Two	47	22	9	8
Three or more	53	19	7	5

(Continued)

Table 5.6

MOST BELIEVABLE ADVERTISING MEDIUM AMONG DEMOGRAPHIC GROUPS (Continued)

	News-papers	Tele-vision	Maga-zines	Ad Mail
Total	48%	21%	8%	8%
By Region				
Northeast	55	18	11	9
North central	56	18	7	9
South	41	24	8	6
West	49	19	8	7
By Ad Mail Today				
None	50	19	7	10
1-2 pieces	49	21	8	8
3+ pieces	54	15	8	6
By Ad Mail In Average Week				
0-5 pieces	46	22	6	9
6-10 pieces	50	20	9	8
11+ pieces	48	22	11	5
By Newspaper Readership				
Yesterday readers	55	18	7	6
Yesterday non-readers	34	26	11	11
Frequent readers	56	18	7	5
Infrequent readers	41	24	9	10
Non-readers	17	31	16	12

Question: "Television, radio, newspapers, magazines, and advertising by mail all carry advertising. Which of these five media would you say has the most believable advertising. Is it mail advertising, newspapers, television, radio, or magazines?"

APPENDIX A: TABLES

Table A.1

RESPONDENT BASES

	First Inter-view	Second Interview		Third Interview	
		Total	Rec'd Ad Mail	Total	Rec'd Ad Mail
Total Respondents	(867)	(658)	(447)	(599)	(272)
By Income					
Under $15,000	158	119	67	107	48
$15,000-$24,999	167	135	85	125	51
$25,000-$34,999	158	130	92	118	58
$35,000-$49,999	126	105	79	94	49
$50,000+	73	58	53	51	30
No answer	185	111	71	104	35
By Age					
18-24	98	76	49	61	22
25-29	119	95	53	80	28
30-34	123	94	70	89	39
35-44	140	117	79	112	55
45-54	120	90	70	86	41
55-64	111	85	63	80	49
65+	144	96	60	87	35
By Education					
Less than H.S. grad	112	86	47	78	26
High school graduate	318	239	146	219	96
1-3 years of college	211	169	128	150	65
College graduate	158	109	85	99	53
Postgraduate work	57	49	36	47	29
By Sex					
Male	280	212	143	191	88
Female	587	446	304	408	183
By Marital Status					
Married	541	423	311	385	187
Divorced/widowed/ separated	192	143	83	136	55
Never married	123	88	50	75	29
By Number Of Adults					
One	222	162	94	150	67
Two	491	371	263	337	152
Three or more	154	125	90	112	52

(Continued)

Table A.1

RESPONDENT BASES
(Continued)

	First Inter-view	Second Interview		Third Interview	
Total Respondents	(867)	Total (658)	Rec'd Ad Mail (447)	Total (599)	Rec'd Ad Mail (272)
By Number Of Adults In HH Currently Employed					
None	194	135	84	126	61
One	302	230	151	210	92
Two	295	237	171	217	101
Three or more	69	56	41	46	17
By Region					
Northeast	171	125	82	114	53
North central	244	192	131	175	81
South	283	209	130	191	81
West	166	130	102	118	56
By Ad Mail Today					
None	NA	212	-	327	-
1-2 pieces	NA	222	222	201	201
3+ pieces	NA	225	225	71	71
By Receipt Of Ad Mail					
Daily	363	279	218	253	120
Several times a week	341	260	162	237	118
Once a week or less	161	117	65	107	33
By Ad Mail In Average Week					
0-5 pieces	321	240	129	216	87
6-10 pieces	308	237	178	216	98
11+ pieces	226	175	138	161	84
By Newspaper Readership					
Yesterday readers	561	424	303	391	185
Yesterday non-readers	306	234	144	208	87
Frequent readers	489	373	268	345	169
Infrequent readers	303	238	158	215	87
Non-readers	75	47	21	39	16

Table A.2

RESPONDENT PROFILES

	First Interview	Second Interview		Third Interview	
		Total	Rec'd Ad Mail	Total	Rec'd Ad Mail
Total Respondents	(867)	(658)	(447)	(599)	(272)
By Income					
Under $15,000	18%	18%	15%	18%	18%
$15,000-$24,999	19	21	19	21	19
$25,000-$34,999	18	20	21	20	21
$35,000-$49,999	15	16	18	16	18
$50,000+	8	9	12	9	11
No answer	21	17	16	17	13
By Age					
18-24	11	12	11	10	8
25-29	14	14	12	13	10
30-34	14	14	16	15	14
35-44	16	18	18	19	20
45-54	14	14	16	14	15
55-64	13	13	14	13	18
65+	17	15	13	15	13
By Education					
Less than H.S. grad	13	13	11	13	10
High school graduate	37	36	33	37	35
1-3 years of college	24	26	29	25	24
College graduate	18	17	19	17	19
Postgraduate work	7	7	8	8	11
By Sex					
Male	32	32	32	32	32
Female	68	68	68	68	67
By Marital Status					
Married	62	64	70	64	69
Divorced/widowed/separated	22	22	19	23	20
Never married	14	13	11	13	11
By Number Of Adults					
One	26	25	21	25	25
Two	57	56	59	56	56
Three or more	18	19	20	19	19

(Continued)

Table A.2

RESPONDENT PROFILES
(Continued)

	First Inter-view	Second Interview		Third Interview	
		Total	Rec'd Ad Mail	Total	Rec'd Ad Mail
Total Respondents	(867)	(658)	(447)	(599)	(272)
By Number Of Adults In HH Currently Employed					
None	22%	21%	19%	21%	22%
One	35	35	34	35	34
Two	34	36	38	36	37
Three or more	8	9	9	8	6
By Region					
Northeast	20	19	18	19	19
North central	28	29	29	29	30
South	33	32	29	32	30
West	19	20	23	20	21
By Ad Mail Today					
None	NA	32	-	55	-
1-2 pieces	NA	34	50	34	74
3+ pieces	NA	34	50	12	26
By Receipt Of Ad Mail					
Daily	42	42	49	42	44
Several times a week	39	40	36	40	43
Once a week or less	19	18	15	18	12
By Ad Mail In Average Week					
0-5 pieces	37	36	29	36	32
6-10 pieces	36	36	40	36	36
11+ pieces	26	27	31	27	31
By Newspaper Readership					
Yesterday readers	65	64	68	65	68
Yesterday non-readers	35	36	32	35	32
Frequent readers	56	57	60	58	62
Infrequent readers	35	36	35	36	32
Non-readers	9	7	5	7	6

Table A.3

ONE DAY'S MAIL

	Average Number Of Pieces					
	Total	Personal Letters	Maga-zines	Bills/ State-ments	Other Bus. Mail	Ad Mail
Total Respondents	3.9	0.6	0.3	0.9	0.7	1.6
By Income						
Under $15,000	3.1	0.5	0.3	0.6	0.6	1.3
$15,000-$24,999	3.5	0.5	0.2	0.8	0.5	1.6
$25,000-$34,999	3.7	0.4	0.2	0.9	0.6	1.6
$35,000+	5.0	0.7	0.4	1.2	1.1	1.9
By Age						
18-29	3.2	0.6	0.2	0.8	0.6	1.1
30-44	3.9	0.5	0.3	1.1	0.7	1.6
45-64	4.7	0.6	0.3	0.9	0.8	2.1
65+	3.6	0.8	0.3	0.6	0.7	1.5
By Education						
Less than H.S. grad	2.9	0.5	0.2	0.7	0.3	1.2
High school graduate	3.5	0.5	0.3	0.8	0.6	1.4
1-3 years of college	4.1	0.5	0.3	1.0	0.8	1.8
College graduate	4.9	0.7	0.3	1.0	1.0	2.0
By Sex						
Male	3.7	0.5	0.3	0.4	0.7	1.6
Female	4.0	0.6	0.3	0.5	0.7	1.6
By Marital Status						
Married	4.3	0.6	0.3	1.0	0.8	1.8
Divorced/widowed/ separated	3.2	0.4	0.2	0.7	0.5	1.4
Never married	3.2	0.7	0.2	0.7	0.5	1.2
By Number Of Adults						
One	3.4	0.5	0.2	0.6	0.6	1.6
Two	4.0	0.6	0.3	0.9	0.8	1.6
Three or more	4.3	0.6	0.3	1.2	0.8	1.6

(Continued)

Table A.3

ONE DAY'S MAIL
(Continued)

	Average Number Of Pieces					
	Total	Personal Letters	Maga-zines	Bills/ State-ments	Other Bus. Mail	Ad Mail
Total Respondents	3.9	0.6	0.3	0.9	0.7	1.6
By Region						
Northeast	4.0	0.8	0.3	1.0	0.8	1.4
North central	3.9	0.5	0.3	1.0	0.8	1.6
South	3.4	0.4	0.2	0.8	0.7	1.4
West	4.6	0.6	0.3	0.9	0.7	2.1
By Receipt Of Ad Mail						
Daily	4.8	0.7	0.3	1.0	0.9	2.1
Several times a week	3.4	0.5	0.3	0.8	0.6	1.3
Once a week or less	2.8	0.4	0.2	0.8	0.4	1.1
By Ad Mail In Average Week						
0-5 pieces	2.8	0.4	0.2	0.8	0.5	1.0
6-10 pieces	4.2	0.6	0.3	0.9	0.8	1.7
11+ pieces	5.1	0.6	0.4	1.0	0.9	2.3
By Newspaper Readership						
Yesterday readers	4.2	0.6	0.3	0.9	0.8	1.7
Yesterday non-readers	3.4	0.5	0.2	0.8	0.5	1.4
Frequent readers	4.3	0.6	0.3	1.0	0.8	1.7
Infrequent readers	3.5	0.5	0.2	0.9	0.6	1.4
Non-readers	2.9	0.4	0.2	0.6	0.4	1.4

Questions: "Could you bring all of today's mail to the phone -- even the catalogs and the mail you would have thrown out? How many pieces of mail were delivered, all together?"

"Please tell me how many personal letters you received today. How many bills or statements are there in today's mail? How many regular magazines are there? And how many other pieces of mail from people you do business with?"

"How many pieces of advertising mail are there? I mean things like catalogs, coupons, political, church, or charitable fund raising mail, and advertising in bills or statements?"

Table A.4

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS

Total Respondents	Yesterday Readers 65%	Frequent Readers 56%	Infrequent Readers 35%	Non-Readers 9%	All 4 Of Last 4 Sundays 46%
By Income					
Under $15,000	55%	49%	32%	9%	46%
$15,000-$24,999	55	44	47	9	52
$25,000-$34,999	61	56	37	8	61
$35,000+	78	69	28	4	72
By Age					
18-29	51	37	51	12	49
30-44	63	57	35	8	60
45-64	74	67	29	4	69
65+	73	68	22	10	57
By Education					
Less than H.S. grad	53	40	43	17	41
High school graduate	62	53	37	10	57
1-3 years of college	66	59	35	6	65
College graduate	74	68	28	4	69
By Sex					
Male	70	63	30	7	65
Female	62	53	37	10	57
By Marital Status					
Married	66	60	34	7	63
Divorced/widowed/separated	63	51	37	12	52
Never married	63	52	38	10	57
By Number Of Adults					
One	63	52	36	12	55
Two	65	58	34	8	61
Three or more	68	57	36	7	60

(Continued)

Table A.4

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS
(Continued)

Total Respondents	Yesterday Readers	Frequent Readers	Infrequent Readers	Non-Readers	All 4 Of Last 4 Sundays
	65%	56%	35%	9%	46%
By Region					
Northeast	60%	50%	42%	9%	64%
North central	67	60	33	7	55
South	63	54	37	9	62
West	69	61	28	11	58
By Ad Mail Today					
None	60	53	39	8	58
1-2 pieces	67	59	36	5	63
3+ pieces	68	63	32	5	65
By Receipt Of Ad Mail					
Daily	68	61	32	7	61
Several times a week	65	57	35	8	60
Once a week or less	57	46	42	12	57
By Ad Mail In Average Week					
0-5 pieces	56	47	40	13	53
6-10 pieces	72	62	31	7	64
11+ pieces	66	62	32	6	63
By Newspaper Readership					
Yesterday readers	100	84	16	-	71
Yesterday non-readers	-	7	69	24	38
Frequent readers	94	100	-	-	77
Infrequent readers	30	-	100	-	46

Questions: "I'd like to ask you to tell me whether you have read or looked at a daily newspaper on any other of the last seven days. Let's start with a week ago today, that is last (DAY OF INTERVIEW)? Did you read a daily paper on (INSERT EACH DAY OF WEEK EXCEPT THOSE ALREADY ANSWERED.)"

"On how many of the last four weekends, if any, did you read or look at a Sunday edition of a newspaper?"

Table A.5

DETAILED DISTRIBUTION OF AD MAIL BY CATEGORY OF ADVERTISER
(Raw Numbers)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
NATION-WIDE MAIL ADS	727	165	562
Publishers	343	59	284
Magazine subscription solicitations	209	30	179
Books/encyclopedias	107	17	90
Newspaper subscription soliciatations	4	2	2
Other publishers	23	10	13
Non-Profit	102	15	87
Military	8	2	6
Religious	26	2	24
National (Girl Scouts)/fraternal	14	2	12
National political issues	9	-	9
Charities	45	9	36
Insurance/Financial	96	14	82
Financial: investments/credit companies/services	34	9	25
Insurance	62	5	57
Coupons	98	48	50
Individual manufacturer's coupons	31	13	18
Assorted coupons, e.g., Carol Wright	67	35	32
Miscellaneous Industries	44	15	29
Hotels/resort areas/recreation parks	14	1	13
Real estate	10	3	7
Automotive	16	9	7
Other miscellaneous industries	4	2	2
All Other National	44	14	30
Business seminars	3	-	3
Other educational	6	-	6
Free samples	2	2	-
Other national	33	12	21

(Continued)

Table A.5

DETAILED DISTRIBUTION OF AD MAIL BY CATEGORY OF ADVERTISER
(Continued)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
MAIL ORDER GOODS	409	133	276
Multi Gifts/Gadgets	92	36	56
Single Category Catalogs	242	79	163
Gardening	51	29	22
Women's/girls' apparel	34	6	28
Men's/boys' apparel	7	1	6
Leisure/sporting goods	4	3	1
Women's and men's apparel	24	11	13
Crafts	15	8	7
Recordings/music/TV	35	2	33
Office products	4	1	3
Collectibles (coins, etc.)	34	6	28
Cosmetics/beauty supplies	17	6	11
Jewelry	4	2	2
Other single category catalogs	13	4	9
Single Items/General Merchandise	75	18	57
General merchandise (luggage, etc.)	41	8	33
Oil company mail offers	10	1	9
Other credit card mail offers	11	3	8
Mail order food items	13	6	7
LOCAL	476	120	356
Total Stores	178	65	113
Department stores	33	19	14
Other Local Stores	145	46	99
Women's/girl's apparel	10	7	3
Men's/boys' apparel	1	-	1
Furniture/carpet	34	1	33
Pizza parlors/restaurants	27	14	13
Deli	2	1	1
Local grocery store	34	11	23
All other local stores	37	12	25

(Continued)

Table A.5

DETAILED DISTRIBUTION OF AD MAIL BY CATEGORY OF ADVERTISER (Continued)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
LOCAL, Continued	476	120	356
Shoppers	51	11	40
Services	89	15	74
Auto repair	11	2	9
Lawn care/landscaping	2	1	1
Construction	7	2	5
Carpet cleaners	7	-	7
Health clubs	2	-	2
Medical/health: hospitals/doctors/ dentists	19	6	13
Public utilities	2	-	2
Financial: banks/investments/advisory	19	2	17
Other local services	20	2	18
Educational/Entertainment/Cultural	43	11	32
Colleges	16	5	11
Adult education	6	-	6
Special schools/programs for children	1	-	1
Other local educational	5	1	4
Cable ads (radio/TV programs/ advertising)	7	2	5
Other local entertainment	4	2	2
Cultural/entertainment (galleries, opera, etc.)	4	1	3
Political	17	3	14
Candidates for national office	8	1	7
Candidates for state, local office	5	1	4
Local, state issues/fundraising	2	-	2
Other local political	2	1	1
Shared Mail	55	1	54
Other Local	43	14	29
Religious	7	4	3
Vacation resorts	7	3	4
Mixed coupons	1	1	-
Local newspapers	25	6	19
Other miscellaneous local	3	-	3

(Continued)

Table A.5

DETAILED DISTRIBUTION OF AD MAIL
BY CATEGORY OF ADVERTISER
(Continued)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
MASS MERCHANDISERS	262	83	179
National Chains	54	26	28
Sears	25	12	13
J. C. Penney	14	10	4
Montgomery Ward	12	3	9
Other national chains	3	1	2
Discount Chains	69	15	54
K Mart	29	7	22
Other (e.g., Zayre, Target, Walmart)	40	8	32
Supermarkets	43	17	26
A&P	-	-	-
Safeway	5	2	3
Kroger	6	1	5
Winn-Dixie	3	-	3
Pathmark	-	-	-
American (Acme/Alpha Beta/Buttrey/ Jewel/Skaggs, Star)	3	1	2
Lucky	-	-	-
Supermarket (not specified)	4	3	1
Other supermarket (not listed)	22	10	12
Other Mass Merchandisers	96	25	71
Home centers (lumber, hardware, etc.)	60	16	44
Drugstores	27	8	19
Radio Shack	9	1	8
Combinations			
Total retail stores (local stores + mass merchandisers)	440	148	292
Total retail (total retail stores + mail order goods)	849	281	568

Table A.6

WHAT AD MAIL PIECE WAS ABOUT

Base: Total Ad Mail Pieces	Total (1880)
Sales/specials/discounts	18%
Advertising	16
Subscriptions	10
Coupons	9
Products	8
Memberships	7
Catalogs/brochures	6
Contest/giveaways/sweepstakes	6
Insurance/banking/investments	4
Services	3
Clothing	3
Newspaper/newsletter	3
Donations	3
Seminars/course offerings	2
Travel/recreation	1
Politics	1
Bills	1
Credit cards	1
Free sample	1

Table A.7

WHAT AD MAIL WAS ABOUT
(Major Mentions By Category of Advertiser)

NATIONAL ADVERTISERS

Magazines	(209)
Subscriptions	75%
Contests	19
Books/Encyclopedias	(107)
Memberships	49%
Advertising	14
Products	11
Subscriptions	8
Non-Profit	(102)
Donations	43%
Memberships	11
Newspaper/newsletter	8
Subscriptions	8
Contests	8
Coupons	(98)
Coupons	90%
Advertising	5
Insurance/ Financial	(96)
Insurance/banking/ investments	60%
Services	16
Credit cards	10
Advertising	7

MASS MERCHANDISERS	(260)
Sales/discounts	51%
Products	17
Catalogs	17

MAIL ORDER

Multi Gifts/Gadgets	(92)
Catalogs	42%
Products	25
Sales/discounts	17
Contests	8
Single Category Catalogs	(242)
Catalogs	17%
Advertising	17
Clothing	17
Products	16
Memberships	12
Sales/discounts	10

LOCAL

Retail Stores	(179)
Sales/discounts	53%
Coupons	15
Advertising	13
Clothing	7
Products	7
Services	(89)
Advertising	24%
Services	21
Coupons	21
Sales/discounts	7

Question: "What is it about?"

Table A.8

HOW AD MAIL WAS ADDRESSED

	(Base)	Indi-vidual	Family	Resi-dent	Postal Route Patron	Wrong Name	No Ad-dress
Total Ad Mail Pieces	(1880)	65%	1%	19%	6%	*%	8%
Nationwide (Net)	(727)	82	2	10	2	*	4
Publishers (Sub-Net)	(343)	93	3	3	1	–	1
Magazines	(209)	94	2	2	1	–	1
Books/encyclopedias	(107)	93	6	1	–	–	1
Non-profit	(102)	90	2	5	2	–	–
Coupons	(98)	29	2	51	7	–	10
Mail Order (Net)	(409)	94	*	2	1	*	2
Multi gifts/gadgets	(92)	91	–	7	1	–	1
Single category catalogs	(242)	95	–	1	1	*	2
Single items/gen. merchandise	(75)	96	1	–	1	–	1
Local (Net)	(476)	34	1	36	14	*	15
Retail stores	(178)	33	1	32	16	1	17
Services	(89)	49	1	12	7	1	29
Mass Merchandisers (Net)	(262)	25	1	40	13	*	20
National/discount chains	(123)	41	2	24	11	1	21

* Less than 0.5%

Question: "Is it addressed to you by name, to someone else in the household, to the family, to 'resident' or 'occupant,' or does it have a wrong name on it?"

Table A.9

WERE CONTENTS DELIVERED IN AN ENVELOPE?

	(Base)	Yes	No
Ad Mail Pieces- First Half Of January	(1389)	49%	51%
Nationwide (Net)	(574)	81	19
Publishers (Sub-Net)	(278)	87	13
Magazines	(172)	91	9
Books/encyclopedias	(89)	81	19
Non-profit	(84)	74	26
Coupons	(85)	76	24
Mail Order (Net)	(313)	52	48
Multi gifts/gadgets	(70)	29	71
Single category catalogs	(186)	56	44
Single items/general merchandise	(75)	51	49
Local (Net)	(322)	11	89
Retail stores	(107)	7	93
Services	(63)	32	68
Mass Merchandisers (Net)	(176)	7	93
National/discount chains	(88)	13	87

Note: Question asked only during first half of January.

Question: "Is it in an envelope?"

Table A.10
CONTENTS OF AD MAIL IN ENVELOPE

	(Base)	Letter	Card	Brochure	Coupons	Return Card/ Envelope	Flyer	Small Related Brochures	PS Note	Stamps	Samples	Other
Ad Mail Pieces In Envelope-(Thrown Out)	(543)	79%	6%	44%	13%	90%	25%	15%	35%	9%	4%	8%
Nationwide (Net)	(376)	83	8	42	9	90	30	11	35	7	1	11
Publishers (Sub-Net)	(211)	94	11	56	1	95	24	9	44	10	1	8
Magazines	(141)	95	13	45	1	95	24	11	40	9	-	9
Books/encyclopedias	(62)	97	5	84	2	97	21	2	49	13	5	7
Non-profit	(57)	70	4	19	-	95	30	4	28	9	-	26
Coupons	(30)*	/	3	3	90	60	27	43	13	3	7	-
Mail Order (Net)	(138)	69	4	54	22	96	15	28	38	17	14	2
Single category catalogs	(91)	67	2	55	23	98	19	13	48	25	17	2
Single items/general merchandise	(33)*	76	6	64	12	94	9	46	9	-	9	7

(Continued)

* Caution: Small base.

Note: Question asked only during the first half of January.

Table A.10

CONTENTS OF AD MAIL IN ENVELOPE
(Continued)

		Nationwide			
	Total	Total	Pub- lishers	Coupons	Mail Order
Base: Ad Mail Pieces In Envelope (Kept)	(133)	(89)	(31)*	(35)*	(25)*
Letter	47%	47%	81%	6%	52%
Card	20	20	32	3	12
Brochure	29	19	39	6	60
Coupons	38	49	13	94	8
Return envelope	36	33	80	3	40
Sample	5	7	3	14	4
Bills	3	1	3	-	4
Other	20	19	19	11	28

* Caution: Small base size.

Note: Multiple responses possible.

Note: Question asked only during first half of January.

Question: "What is in the envelope?"

Table A.11

FORMAT OF ADS NOT IN ENVELOPE

	(Base)	Circular	Catalog	Folder/ Brochure	Shopping Guide	Card	Flyer
Ad Mail Pieces Not In Envelope	(712)	23%	30%	8%	5%	17%	6%
Nationwide (Net)	(108)	5	21	18	2	22	6
Mail Order (Net)	(150)	7	83	5	1	3	-
Single category catalogs	(81)	6	83	5	-	5	-
Local (Net)	(288)	18	8	10	8	32	12
Retail stores	(99)	41	14	9	1	17	11
Services	(43)	7	2	7	-	40	30
Mass Merchandisers (Net)	(162)	59	25	4	6	2	1
National/discount chains	(77)	51	34	4	4	3	-

Note: Question asked only during first half of January.

Question: "What is it?"

Table A.12

AD MAIL ITEMS THAT CAME FOLDED WITH OTHER ITEMS

	(Base)	Folded With Other Items	Mean # Of Items
Ad Mail Pieces Not In Envelope	(712)	30%	6.4
Nationwide (Net)	(108)	21	*
Mail Order (Net)	(150)	3	*
Multi gifts/gadgets	(50)	2	*
Single category catalogs	(81)	4	*
Local (Net)	(288)	40	6.8
Retail stores	(99)	38	6.4
Services	(43)	58	9.3
Mass Merchandisers (Net)	(163)	41	5.5
National/discount chains	(77)	38	6.0

* Base too small to permit meaningful data.

Note: Question asked only during first half of January.

Questions: "Did it come folded together with other items (like sections of a newspaper)?"
(YES) "How many items came folded together?"

Table A.13
USE OF COLOR BY CATEGORY OF ADVERTISER

Ad Mail Items Thrown Out	Base) (1058	Black & White 13%	Spot Color/ B&W 9%	All Spot Color 4%	B&W/ Process Color 10%	All Process Color 15%	One Color 8%	Black Ink/ Colored Paper 8%	2 color Ink/White Paper 26%	Various 7%
Nationwide (Net)	(464)	15	7	3	6	13	9	10	29	8
Publishers (Sub-Net)	(239)	14	8	4	7	14	8	9	28	9
Magazines	(153)	17	6	3	5	12	11	9	29	9
Books/encyclopedias	(76)	8	14	6	9	19	2	8	26	9
Non-profit	(75)	17	7	1	7	7	12	11	31	7
Coupons	(46)	2	12	3	12	24	8	5	21	12
Mail Order (Net)	(219)	11	4	5	13	25	6	6	21	8
Multi gifts/gadgets	(44)	1	3	-	22	40	4	8	13	8
Single category catalogs	(129)	14	5	8	11	21	7	7	20	8
Single items/general merchandise	(46)	9	3	1	13	27	7	4	29	7
Local (Net)	(253)	15	17	2	12	6	9	6	30	4
Retail stores	(68)	8	6	3	24	15	11	6	21	7
Services	(53)	15	5	2	5	2	11	8	48	3
Mass Merchandisers (Net)	(119)	3	30	16	21	9	1	4	14	3
National/discount chains	(62)	3	22	12	29	14	1	1	16	1

(Continued)

Note: Question asked only during first half of January.

Table A.13

USE OF COLOR BY CATEGORY OF ADVERTISER
(Continued)

Ad Mail Items Kept	(Base)	Black & White	Color	Both
	(331)	14%	62%	14%
Nationwide (Net)	(110)	13	63	25
Publishers	(39)	15	46	39
Coupons	(39)	8	87	5
Mail Order (Net)	(94)	5	72	22
Single category catalogs	(57)	7	68	25
Local (Net)	(69)	35	45	19
Retail stores	(39)	28	59	13
Mass Merchandisers (Net)	(57)	4	66	31

Note: Question asked only during the first half of January.

Question: "Are the contents printed in black and white or in color?"

Table A.14

TYPES OF PAPER USED BY CATEGORY OF ADVERTISER

Ad Mail Items Thrown Away	(Base) (1058)	News-print 12%	Roto 6%	Coated 38%	Letter 57%	Card 28%
Nationwide (Net)	(464)	4	3	41	84	37
Publishers (Sub-Net)	(239)	4	3	49	90	50
Magazines	(153)	-	2	43	93	49
Books/encyclopedias	(76)	11	3	63	86	55
Non-profit	(75)	4	-	23	84	19
Coupons	(46)	9	9	63	50	33
Mail Order (Net)	(219)	1	1	76	64	10
Multi gifts/gadgets	(44)	2	5	93	27	7
Single category catalogs	(129)	1	1	69	72	13
Single items/general merchandise	(46)	2	-	80	74	2
Local (Net)	(253)	20	5	14	27	38
Retail stores	(68)	16	13	29	19	25
Services	(53)	4	-	8	51	43
Mass Merchandisers (Net)	(119)	49	33	9	8	5
National/discount chains	(62)	26	50	13	11	6

(Continued)

Note: Multiple answers possible.

Table A.14

TYPES OF PAPER USED BY CATEGORY OF ADVERTISER
(Continued)

	(Base)	News-print	Maga-zine	Letter	Card
Ad Mail Items Kept	(331)	24%	54%	15%	8%
Nationwide (Net)	(110)	9	56	28	11
Publishers	(39)	13	39	39	18
Coupons	(39)	5	85	8	3
Mail Order (Net)	(94)	13	80	6	2
Single category catalogs	(57)	14	77	7	4
Local (Net)	(69)	31	32	18	19
Retail stores	(39)	33	41	10	15
Mass Merchandisers (Net)	(57)	66	33	2	-

Note: Multiple answers possible.

Note: Question asked only during the first half of January.

Question: "Excluding the envelope, is it printed on the kind of paper that daily newspapers are printed on, or the kind of paper that magazines are printed on, or is it printed on letter paper or on card stock?"

Table A.15

SIZE OF AD MAIL PIECES IN ENVELOPE

	(Base)	3x10 Or Smaller	4x6-4x11	5x10-6x9	8x10 Or Larger
Total Ad Mail Pieces In Envelope (Thrown Away)	(543)	2%	56%	34%	8%
Nationwide (Net)	(376)	3	51	36	10
Publishers (Sub-Net)	(211)	2	41	41	15
Magazines	(141)	1	50	43	6
Books/encyclopedias	(62)	2	23	39	36
Non-profit	(57)	7	72	18	4
Mail Order (Net)	(138)	1	63	32	4
Single category catalogs	(91)	1	67	28	3
Total Ad Mail Pieces In Envelope (Kept)	(133)	14%	18%	40%	26%

Note: Question asked only during January.

Question: "How big is it?"

Table A.16

SIZE OF AD MAIL PIECES NOT IN ENVELOPE

	(Base)	Under 8-1/2 x11	8-1/2 x11	8-1/2 x14-11x17	14x21	21x29
Total Ad Mail Pieces Not In Envelope (Thrown Away)	(514)	50%	22%	19%	5%	4%
Nationwide (Net)	(87)	60	33	7	-	-
Mail Order (Net)	(81)	61	36	4	-	-
Single category catalogs	(38)	53	45	3	-	-
Local (Net)	(232)	54	18	20	3	4
Retail stores	(64)	45	22	23	5	5
Services	(39)	64	26	10	-	-
Mass Merchandisers (Net)	(111)	28	14	35	17	6
National/discount chains	(56)	27	21	38	7	7

	(Base)	Under 8-1/2 x11	8-1/2 x11	Square	14x21	21x29
Total Ad Mail Pieces Not In Envelope (Kept)	(198)	25%	52%	9%	13%	2%
Mail Order (Net)	(69)	36	52	6	6	-
Single category catalogs	(43)	16	72	5	7	-
Local (Net)	(56)	27	54	9	9	2
Retail stores	(35)	20	57	11	9	3
Mass Merchandisers (Net)	(52)	8	50	12	25	6

Note: Question asked only during first half of January.

Question: "How big is it?"

Table A.17

MEAN NUMBER OF PAGES IN AD MAIL PIECES

	(Base)	Mean # Of Pages
Total Ad Mail Items- First Half Of January	(1389)	16.7
Nationwide (Net)	(574)	12.2
Publishers (Sub-Net)	(278)	11.5
Magazines	(172)	8.2
Books/encyclopedias	(89)	18.0
Non-profit	(84)	7.4
Coupons	(85)	26.3
Mail Order (Net)	(313)	32.8
Multi gifts/gadgets	(70)	65.1
Single category catalogs	(186)	26.0
Single items/general merchandise	(57)	15.2
Local (Net)	(322)	8.7
Retail stores	(107)	11.1
Services	(63)	5.9
Mass Merchandisers (Net)	(176)	17.4
National/discount chains	(88)	22.2

Note: Question asked only during first half of January.

Question: "About how many pages or sheets are there in it?"

Table A.18

CHARACTERISTICS OF BUSINESS DIRECT MAIL

	Total
Base: Total Items	(69)
What Is It About?	
Catalogs/brochures	22%
Subscriptions	19
Products	13
Sales/specials/discounts	12
Seminars/course offerings	10
Credit cards	6
Contests/giveaways	6
Advertising	4
Coupons	4
Other	5
Is The Item In An Envelope?	
Yes	44%
No	56
Number Of Pages In Item	
MEAN	21.1
Use Of Color	
All black and white	11%
Some pages B&W/some spot color	4
Some pages B&W/some process color	18
All process color	19
All 1-color ink, not black & white	5
Black ink on colored paper	8
2-color ink on white paper	25
Various	12
Kind Of Paper*	
Letter/flyer paper	55%
Coated paper	45
Card stock	10
Newsprint	6
Roto paper	1

* Multiple responses possible.

APPENDIX B:

ESTIMATING THE DOLLAR VOLUME OF DIRECT MAIL IN 1986

ESTIMATING THE DOLLAR VOLUME
OF DIRECT MAIL IN 1986

This appendix outlines the procedure NAB used to estimate the dollar volume of direct mail in 1986. The identical procedure was employed for the 1982 estimate.

1. The direct mail sent in to the research company was coded into 21 categories: nationwide (6), mail order goods (3), local (8), and mass merchandisers (4).

2. NAB selected a representative sample of items from each of the 21 categories of ad mail.

3. Estimates of the cost-per-thousand (CPM) for printing and handling of the ad mail items selected in Step #2 were obtained from three professionals with experience in printing or direct mail. The average CPM for each category of ad mail was computed.

4. The percentage distribution of ad mail used to estimate the dollar volume of direct mail was the distribution by category obtained from the call-back interviews during the entire month of January 1986. The base was the 1874 pieces from known types of advertisers.

5. The number of pieces of third-class mail (55,974,251,000) and the postage ($5,746,750,000) for calendar year 1986 were obtained from the United States Postal Service (USPS).

6. Multiplying the number of pieces of third-class mail (Step #5) by the proportions of ad mail in each category (Step #4) yielded estimated numbers of pieces of direct mail in each category.

7. Multiplying the estimated amount of ad mail (Step #6) by the CPM for each category (Step #3) yielded an estimate for the total printing and handling costs for each category of ad mail.

8. Printing and handling costs ($8,561,805,000) for the totality of ad mail pieces was added to total third-class postage ($5,746,750,000) to produce the total costs for consumer direct mail ($14,308,555,000).

9. Postage costs were allocated to the 21 categories according to their respective percentages of printing and handling costs. These postage costs were added to the printing and handling costs (Step #7) to produce the estimates of total costs for each category of consumer direct mail.

10. Business-to-business direct mail was assumed to be one-third of the dollar volume of consumer direct mail. This yielded an estimate of $4,769,518,000 for business-to-business direct mail and an estimate of $19,078,073,000 for total direct mail costs.

The distribution of the dollar volume of direct mail by categories of advertiser were calculated in two ways: by the direct estimate of production and handling costs, as outlined above; and by assigning to each category a production and handling cost estimate equal to its October 1982 estimate plus 15 percent (see Table B.3, "Distribution of Consumer Ad Mail Costs By Category of Advertiser").

Table B.1

SOURCES OF AD MAIL: 1986 AND 1982

Base: Ad Mail Pieces From Known Sources	Jan. 1986 (1874)	Oct. 1982 (1006)
Nationwide Direct Mail (Net)	39%	29%
Publishers	18	8
Non-profit	5	7
Insurance/financial	5	5
Coupons	5	4
Miscellaneous industries	2	2
All other	2	3
Mail Order Goods (Net)	22	15
Multi gifts/gadgets	5	4
Single category catalogs	13	5
Single items/general merchandise	4	6
Local (Net)	25	33
Stores (Sub-net)	10	8
Department stores	2	4
All other stores	8	4
Shoppers	3	3
Services	5	6
Educational/entertainment/cultural	2	3
Political	1	10
Shared mail	3	NA
Other	2	2
Mass Merchandisers (Net)	14	22
National chains	3	7
Discount chains	4	6
Supermarkets	2	6
Other mass merchandisers	5	3
Combinations		
Total retail stores (local stores + mass merchandisers)	23%	31%
Total retail (total retail stores + mail order goods)	45	46

Table B.2

TOTAL PRODUCTUION COSTS: 1986 AND 1982
(Cost Per Thousand Pieces)

	Jan. 1986	Oct. 1982
Nationwide Direct Mail		
Publishers	$235	$175
Non-Profit	160	70
Insurance/financial	170	80
Coupons	160	200
Miscellaneous industries	130	120
All other national	105	90
Mail Order Goods		
Multi gifts/gadgets	250	270
Single category catalogs	165	220
Single items, general merchandise	190	100
Local		
Total Stores		
Department stores	135	275
Other stores	85	110
Shoppers	95	60
Services	85	25
Educational/entertainment/cultural	95	150
Political	35	70
Shared mail	60	NA
Other local	65	110
Mass Merchandisers		
National Chains	155	90
Discount chains	140	45
Supermarkets	80	50
Other mass merchandisers	95	50

Table B.3

DISTRIBUTION OF CONSUMER AD MAIL COSTS BY CATEGORY OF ADVERTISER

	Jan. 1986		
	Direct Estimate	1982 CPM + 15%	Oct. 1982
Nationwide Direct Mail (Net)	48.5%	41.4%	33.4%
Publishers	28.1	23.9	13.7
Non-Profit	5.7	2.8	4.8
Insurance/financial	5.7	3.0	3.9
Coupons	5.5	7.9	6.5
Miscellaneous industries	2.0	2.2	2.3
All other national	1.6	1.6	2.2
Mail Order Goods (Net)	26.9	34.0	27.8
Multi gifts/gadgets	8.0	9.9	10.8
Single category catalogs	13.9	21.1	11.4
Single items/ general merchandise	5.0	3.0	5.6
Local (Net)	13.9	18.4	25.8
Total Stores (Sub-Net)	5.9	9.9	14.5
Department stores	1.6	3.6	10.2
Other stores	4.3	6.3	4.3
Shoppers	1.7	1.2	1.5
Services	2.6	0.9	1.5
Educational/entertainment/ cultural	1.4	2.5	4.7
Political	0.2	0.5	1.0*
Shared mail	1.2	2.3	NA
Other local	1.0	1.0	2.7
Mass Merchandisers (Net)	10.7	6.2	13.0
National Chains	2.9	2.0	6.2
Discount chains	3.4	1.3	2.5
Supermarkets	1.2	0.9	2.8
Other mass merchandisers	3.2	2.0	1.5

* This estimate excludes the candidate mail. Non-candidate political mail was 1.7% of the ad mail in October 1982.

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1987

"HOW NEWSPAPER ADS SELECT CUSTOMERS" REVISITED

The Continuing Study
of Advertising Performance
Second Wave: 1985-1986

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
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"HOW NEWSPAPER ADS SELECT CUSTOMERS" REVISITED

THE CONTINUING STUDY OF ADVERTISING PERFORMANCE
SECOND WAVE: 1985-1986

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

April 1987

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BACKGROUND AND METHODOLOGY

In 1978, NAB began a series of surveys that were to become the first wave of the Continuing Study of Advertising Performance. The goal was to measure newspaper readers' exposure to advertisements, the likelihood of their buying what is advertised (product prospect status) and interest in ads themselves.

Between 1978 and 1981, 27 newspapers across the country volunteered to participate in the project. A total of 339 different ads were tested in interviews that yielded more than 50,000 responses. The cumulative results of the surveys were highlighted in a booklet How Newspaper Ads Select Customers, which is available from the Bureau.

The second wave of the Continuing Study began in late 1984 and continued through 1986. This report summarizes the results of the first eighteen surveys undertaken, which employed the questionnaire and survey guidelines developed by the Bureau, by sixteen different newspapers all over the United States (two of which did the survey twice).

The analysis of data for this report, the writing of the report and most of the work of coordinating individual studies from the Bureau was done by Dr. Leon Aron.

A minimum of 10 and a maximum of 15 ads were chosen for each survey by participating newspapers. On the day of publication a newspaper's readers were located either by random digit dialing or via subscribers' lists. Those who agreed to be interviewed and had that day's paper at home were asked to bring the edition to the phone.

The first objective of the interview was to measure ad exposure. Respondents were asked if they had read or looked at anything on each of the pages containing the ads (or if they had opened those pages at all).

After measuring page opening, readers were asked to go back to the first ad, and, while looking at it, answer three questions in the following order:

> "Does this ad advertise anything for which you, yourself, would be a customer during the next year or so?"
> (Definitely yes, maybe, or definitely no.)

> "If you were a customer for the product or products advertised, would the advertiser be your first choice, a possible choice, or an unlikely choice?"

> "Apart from your feelings about what is advertised, does the advertisement itself have any interest at all for you, or is it of no interest at all?"

All three questions were asked for every tested ad. Data were also collected on sex, age, education, and income of the respondents.

Despite the length of the interview (respondents had to go through a newspaper twice) and the fact that the entire survey had to be completed within a few hours (usually between 6 p.m. and 9 p.m. on the day of issue) only three out of the eighteen surveys ended up with fewer than 150 respondents. The total number of respondents was 3,306; in all 195 different ads were measured.

HIGHLIGHTS

1. Page Opening Levels Are Very High.

About 4 out of 5 readers open an average newspaper page containing an ad.

There is almost no difference in the frequency of page opening between those who are interested in buying what is advertised on a page (product prospects) and those who are not (non-product prospects).

Readers' demographic characteristics are, likewise, largely unrelated to the page-opening levels.

2. Those Who Are Interested in a Product Are Also Likely to be Interested in the Ad for that Product.

Readers' interest in advertising is notably and consistently influenced by their product prospect status.

Those who plan on buying what is advertised are more likely to find interesting the average ad for that particular product. Newspaper ads thus continue to select the best customers for products.

While 3 out of 4 _product prospects_ are interested, a sizable minority (almost 1 in 4) of _non-product prospects_ are also interested.

3. _Product Categories Influence Ad Interest_.

Ads for different product categories result in vastly different levels of interest. These differences, furthermore, are just as large for non-product prospects as for prospects. Thus, regardless of whether or not a reader is _currently_ in the market for a particular product, ads for some products are likely to be found more interesting than those for other products.

4. Brand or Store Orientation Influences Ad Interest--Even Among Non-Product Prospects.

Both among product prospects and non-product prospects, ad interest is affected by degree of preference for the store or brand advertised. Even those who are not currently in the market for particular products, apparently, distinguish between the advertised brands of such products as well as between outlets that sell them.

Whether or not they were product prospects, those for whom a brand or a store was "first choice" displayed higher levels of ad interest than those who thought they might be a "possible choice." Readers in both of these two choice categories were, in turn, considerably more interested in ads than those "unlikely" to buy the advertised brand or shop in the advertised store.

5. Copy Matters.

Even within the same product category, a number of specific copy elements can make a difference in readers' interest in advertisements.

6. Results of this Study Match the Earlier Study.

Newspaper audiences' exposure to advertisements, the interest in ads, and the likelihood of buying advertised products are remarkably consistent over time. In virtually every key area, the results of the second wave are extremely close to those established by the earlier series of Ad Performance surveys.

Such consistency is especially impressive in view of the fact that only four of the second-wave newspapers participated in the first series of Ad Performance surveys.

FINDINGS

Page Opening

Almost every reader comes face to face with the average ad. Four in five respondents (80%) said they had opened pages containing the tested ads. Moreover, as Table 1 shows, the page-opening levels established by the second wave are close to those uncovered by the Ad Performance I.

TABLE 1

	Wave I	Wave II
	(1978-1979)	(1985-1986)
Total responses	(51,131)	(38,011)
Opened page	86%	80%
Did not open	14%	20%

Page-opening is not notably dependent on readers' demography. As Table 2 demonstrates, differences between demographic categories do not exceed 5 percentage points. For example, women are more likely to open a page than men. Additionally, those in the 55+ age group have a higher incidence of page-opening than those under 35.

TABLE 2

	Sex		Age		
	Male	Female	Under 35	35-54	55+
Opened page	77%	82%	77%	81%	82%

	Education			Income	
	High School	Some College	College Grad	Under $25,000	$25,000+
Opened page	82%	80%	78%	82%	78%

There are some differences in page-opening depending on the type of page. However, with the average page opening level at 80%, lower-than-average incidences of page-opening were registered only for such specialized sections as sports (70%)
and business/finance (57%).

Higher-than-average levels, as one would expect, were found for thinner papers: 92% for two-sections papers as compared with 78% for ones containing seven sections.

Page opening does not seem to be notably affected by the day of the week or month of publication.

Furthermore, the incidence of readers' opening an ad-bearing page is likewise only slightly influenced by whether or not they are likely to buy what is advertised. Non-prospects display similarly high levels (82% vs. 78%) of page-opening as prospects (see Table 3).

TABLE 3

	Wave I (1978-1979)	Wave II (1985-1986)
Total responses	(51,131)	(38,011)
Prospect: (Would/Might be Customer)	50%	52%
Opened page	87%	82%
Did not open	13%	18%
Total	100%	100%
Non-Prospect: (Would not be Customer)	50%	48%
Opened page	84%	78%
Did not open	16%	22%
Total	100%	100

Prospect Status and Ad Interest

"Newspaper ads select customers." This was, perhaps, the most important finding of the first wave of the Ad Performance Study.

The 1986 wave confirmed what might be called the "prospect status/ad interest" rule. True for all product categories, it says that those who are most likely to buy a product are also most likely to be interested in ads for that product. For the sample as a whole, 74% of product prospects were interested, compared with 23% for non-product prospects. Again, the numbers are very close to those arrived at in the first wave, where 76% of prospects and 18% of non-prospects were interested.

The correlation between product prospect status and interest in advertisement becomes still more apparent when product prospect status is broken down by the categories of consumer brand or store choice, i.e., by whether a particular brand or store would be the readers' first, possible or unlikely choice.

Thus, even among those who did not plan to buy the advertised product in the next year, half (48%) of readers for whom a brand or store were first choice were interested in the relevant ads. Among the non-product prospects who said the brand or store was a possible choice, 37% expressed interest. For the non-product prospects who called a brand/store an unlikely choice, the interest level was at 14%.

Table 4 shows that among product prospects in the "first" and "possible choice" groups, the proportion of those interested in ads is nearly twice as great a among non-prospects. In the "unlikely choice" category, the interest among prospects was over 3 times greater even taking into account statistical variation. Again, there was virtually no difference in this respect from Wave I results.

TABLE 4: Ad Interest

	PROSPECT (Would/Might be a customer)			NON-PROSPECT (Would not be a customer)		
	first choice	possible	unlikely	first choice	possible	unlikely
Wave II	87%	75%	47%	47%	37%	14%
Wave I	90%	78%	48%	48%	33%	11%

3. Product and Ad Interest

As we have seen, product prospect status is responsible for a great deal of ad interest: those who are planning to buy pay greater attention to relevant ads than those who are not currently in the market.

But, of course, newspapers deliver both actual and potential customers: Four fifths of non-prospects (79%) open an average newspaper page. Like those who are currently in the market for advertised products, non-prospects are brought face-to-face with pages containing ads. Apart form the intention to buy, are there any other factors that influence readers' interest in advertisements?

Interest in ads transcends the effects of one's prospect status. This interest seems to reflect a complex process in which readers' pre-existing buying interest (prospect status) and pre-existing store/brand preferences, on the one hand, interact with products' inherent appeal and copy's creative appeal on the other. Thus, what advertisers bring to the ballgame is crucial to ads' success, whether or not readers are currently in the market for advertised products.

A paramount factor in securing readers' interest is the product itself. If we look at the most frequently advertised products in the survey (i.e., those with at least 1,000 responses and at least four ads per category), the differences in product appeal become apparent. While the average ad interest for all product categories/advertisers was 49%, some products and advertisers scored higher, while others received average ratings or dipped below the overall average, as Table 5 shows.

TABLE 5

HIGH AD INTEREST	MEDIUM +	LOW
supermarkets: 70%	discount stores: 58%	banks: 36%
airlines: 61%	department stores: 56%	auto dealers: 36%
	apparel (men): 53%	cigarettes: 22%
	apparel (women): 51%	

Furthermore, interest in ads differs from product to product both among prospects and among non-product prospects. As one would expect, prospects are more interested than non-prospects in the case of all individual products. However, the variations in interest from product category to product category are as great among non-prospects as among prospects.

For example, among prospects for disposable diapers, interest is 96%, as compared to an interest level of 52% for cigarette ads among smokers (a 44 percentage point difference). Similarly, among non-prospects an interest score for vegetable oil is 48% vs. 9% for beer (a 39 percentage point difference).

Creative Treatment and Ad Interest

Does copy matter? Every ad in the survey was classified in terms of 27 characteristics unrelated to what was advertised. Among these were the size of the newspaper; the number of sections; the type of section in which the ad appeared; the position within the section; the day of the week; the time of publication; the ad's position on the page' its size; the presence of color; the type of headline; the size of illustration etc.

Contrary to what might be expected, ad interest shows no consistent relationship with copy's physical attributes. The explanation may lie in the "forced exposure" manner of posing the interest question. The respondent is asked to open to the page with the ad, to look at it and then say if the ad is interesting. Given this situation, it is plausible that physical characteristics have less bearing on interest than the ad's content or connotations.

On average this is true. But when we examine individual ads within the same product category, it becomes immediately apparent that copy's creative execution does matter a great deal: ads for the same product vary considerably in their ability to arouse readers' interest.

We analyzed ads for three product categories, which were among those most frequently tested: airlines, new cars and cigarettes.

Airline Ads

Among the airline ads, we tested nine that scored above or below the product category ad interest average of 61%. (Table 6)

TABLE 6

	ABOVE AVERAGE				BELOW AVERAGE				
AD #	1	2	3	4	5	6	7	8	9
Ad interest score	75%	70%	65%	63%	51%	47%	47%	47%	41%

First, we wanted to make sure that the differences between ads in two groups are statistically significant. Three pairs of ads were tested, each pair consisting of an ad from each group: the ads for the same airline (#1 and #9); the ads that appeared on the same day in the same paper (#4 and #8); the ad with the lowest interest score in the "above the average" group (#4) vs. the ad with the highest interest score in the "below average" group (#5).

In every case, the differences between the groups proved statistically significant ($p <= .015$).

Next, we tried to establish what creative features might have accounted for the differences in ad interest. Obviously, interest is influenced by many different points of view. However, as Table 7 demonstrates, all four of the above-average ads contain at least three of the four following copy elements.

- o multiple destinations;
- o multiple destinations boldly spelled out;
- o actual destination prices boldly spelled out;
- o sales of limited duration.

Only one of the ads whose interest levels were below average had more than one of the above features.

TABLE 7

		Ad Characteristics				
	Inter - est Score	Multiple Destination		Prices; Large/ Bold Type	Sale/ Limited Offer	Sum of +'s
		Any Type	Large/ Bold Type			
Ad #						
Above Average Ads						
1	75%	+	+	+	+	4
2	70	+	+	+	+	4
3	65	+	-	+	+	3
4	63	+	+	+	+	4
Below Average Ads						
5	51%	+	-	-	-	1
6	47	+	-	-	-	1
7	47	-	-	+	-	1
8	47	+	-	-	+	2
9	41	-	-	-	-	0

In this small sample of airline ads, prices boldly spelled out and limited sales duration, taken together, probably are the most important copy points in generating high interest. All the high-scoring ads had both copy points. Three of the low-scoring ads had neither and the remaining two -- #7 and #8 -- had only one.

The next most important copy point was multiple destinations clearly spelled out. All the high-scoring ads referred to multiple destinations but so did three of the five low-scoring ads. However, none of the low-scoring ads boldly spelled out those destinations, while three of the four high-scoring ads did. The only high-scoring ad not to proclaim the multiple destination boldly was barely above average in interest.

Thus, it seems that the most popular "hot buttons" for this product category of ads are price, sales duration and multiple destinations together in the same copy.

Cigarette Ads

With the same caveats in mind (i.e., few ads and many individual readers' points of view), we subjected the cigarette ads tested in the surveys to a similar analysis. We divided the 12 cigarette ads into four groups:

1) those that scored well above the product category average (there was only one ad in this group);

2) ads that scored above average;

3) ads that were average or a little below;

4) ads that scored considerably below average.

Although the results are not as clearcut as might be wished, cigarette ads are more likely to gain readers' interest if they satisfy the following three conditions:

— contain a realistic picture of the product (packs, cartons or individual cigarettes pictured and proportioned to look "like real");

— contain a price incentive, e.g., "five free in a pack" or "30 for the price of 25" (This seems especially important in order to do well among non-prospects);

— are simple and straightforward, not cluttered with the kind of copy or pictures that distract from the product or price incentive;

Finally, color alone does not seem to salvage ads that lack all of the above features.

TABLE 8

Ads			Ad Characteristics					
Group	Number	Interest Score	Realistic Picture	Price Incentive	No Distracting Copy	No Distracting Picture	Black and White	Sum of Pluses
I	1	39%	+	+	+	+	+	5
II	2	33%	+	+	+	+	+	5
	3	27	+	+	+	+	+	5
	4	26	+	-	-	-	-	1
	5	23	+	-	+	+	-	3
III	6	19%	+	-	-	+	-	2
	7	17	-	-	-	-	-	0
	8	16	-	+	-	-	-	1
	9	15	+	-	-	+	-	2
IV	10	13%	-	-	-	-	-	0
	11	10	-	-	-	-	-	0

New Car Ads

As before, we divided ads for new cars into four groups by interest levels:

1) ads that scored substantially above the product category average (there was one ad in this group);
2) ads that scored above average;
3) ads that scored slightly below average;
4) ads that scored considerably below average.

Judging by the results of this analysis, presented in Table 9, the following copy characteristics seem to enhance readers' interest in ads for new cars:

-- pictures of cars unobscured by cluttered environment;
-- sale announcements;
-- terms of financing (percent rate writ large);
-- engineering details - if they have a good story to tell, as in the case of the highest scoring ad for Mercedes-Benz.

The best results are achieved by combining a picture of the car with at least one of the other features.

In none of the above features is present, the new car ad is likely to score low on interest. This is true even for such a respected car as Volvo. Unlimited mileage in a warranty, which was the message of the two Volvo ads in the survey, did not make up for the absence of the other features. The same is true of collision resistance (ad #8).

The copy characteristics were distributed among the new cars ads in the survey as follows:

TABLE 9

Ads			Ad Characteristics						
Group	Number	Interest Score	Car Picture(s)	Sale	% Financing	Engineering	Unlimited Warranty Mileage	Collision resistance	Sum of +'s
I	1	53%	+	–	–	+	–	–	2
II	2	42%	+	–	+	–	–	–	2
	3	40	+	+	–	–	–	–	2
III	4	36%	–	–	+	–	–	–	1
	5	33	–	+	–	–	–	–	1
IV	6	30%	–	–	–	–	+	–	1
	7	30	–	–	–	–	+	–	1
	8	29	–	–	–	–	–	+	1

While each of the three product categories discussed here requires its own special creative approaches to achieve maximum effect, at least two principles seem to apply to the ads for all three product categories.

One is that the main points of a copy should be boldly spelled out so that the reader can quickly and easily grasp them. The other prescription for generating interest is that the main points be spelled in enough detail so that the reader would find it useful to think about the message at least a little. The reader may, for instance, ponder the list of destinations to see if he or she might be going to any of them. Or the reader may evaluate feelings of need for specific engineering features of the advertised car.